

*Access to Microfinance & Improved Implementation of Policy Reform
(AMIR 2.0 Program)*

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*Work Plan to Build the Jordan Tourism Board's Capacity to Promote Tourism
Sandra A. Chesrown, AICP, CMI for Chemonics International*

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EXECUTIVE SUMMARY - THE ANCIENT OAK TREE OF TOURISM IN JORDAN

A. Introduction

“Indigenous culture and natural beauty overlaid with heritage and history.” A pitch for Australia but could it be Jordan...? What is its magic?

This report contains the results of a consulting assignment carried out by Sandra A. Chesrown, CMI, over a period of 20 days for Chemonics International as part of the AMIR 2.0 program's Business Management Initiative (BMI), funded by USAID. The objective was to develop a detailed, comprehensive work plan for AMIR 2.0 to assist the Jordan Tourism Board, and related tourism sector organizations, in their capacity building.

Specific tasks included familiarization with background material, background interviews during a field visit to Jordan (Ms. Chesrown interviewed 50 different players in the tourism market), analysis of existing and new sub-sectors of tourism, development of a comprehensive set of issues and constraints, formulation of a Year 2002 Action Plan of tasks with related Scopes of Work, Consultant Names, and Levels of Effort, to result in both short and long-term solutions. This report is divided between Volume I, which includes findings, recommendations, and the work plan, and Volume II, which includes a bibliography, detailed background interviews, and JTB's SWOT (strengths and weaknesses) analysis.

The Work Plan contains dozens of ideas for AMIR funding. It offers AMIR broad opportunities for involvement in tourism economic development across Jordan. Although not all projects could be funded and accomplished in the Year 2002, the AMIR program is a 4 year program, and therefore it is hoped that there will be opportunities for implementation in future years.

Successful tourism can erase international biases and link cultures. Tourism is very encompassing. Its roots, like an ancient tree, reach out to numerous players and sectors of both the local or national and international economy. To be successful, tourism must establish linkages throughout its national framework and around the globe.

Before 9/11, the trend toward globalization seemed unstoppable. From 1980-2000, numerous, previously forbidden regions and countries were added to the world traveler's list of favorite places, including Vietnam, Cambodia, Laos, China, the Stans, and Mongolia. Regardless of the Gulf War and regional strife, Jordan was a growing contender on the world map, and it has the potential to be so again. Jordan needs to better position itself to increase market share and meet future demand.

Tourism creates jobs faster than any other industry. Tourism is a key economic driver in Jordan. After worker's remittances, tourism is the second largest foreign currency contributor to Jordan's balance of payments.

According to the "Tourism Sector Report" by the Export Finance Bank, between 1993 and 2000 tourist arrivals to Jordan increased by 84%, to reach 1.4 million in 2000. 52% of tourists were from the Middle East, 23% were from Europe, 10% were from Israel, 9% were from the Americas, and 4% were from Asia (primarily Indonesia and Japan), with 2% not indicated. Total receipts from tourism in 2000 reached US\$743 million or 8.5% of GDP. From 1997 – 2000, US\$500 million were invested in tourism projects. In 2000 there were 21,515 people employed in the tourism sector. Of that number, 40% of the jobs were generated by the hotel industry.

Despite impressive growth, however, Jordan's growth in tourist arrivals is the lowest in the region. According to the World Tourism Organization, 1999 tourist arrivals were higher in Cyprus, Israel, Dubai, and Bahrain. While the number of tourist arrivals increased by 8% in Jordan, the number in Morocco increased by more than 20%, and the number in Egypt increased by 40%. Outside the region, another moderate Muslim country, Malaysia, received 10.2 million tourists in 2000 (v. Jordan's 1.4 million).

Malaysia exhibits extraordinary promotional capabilities. In 1999, Israel spent US\$36 million, Egypt spent US\$40 million, and Jordan spent US\$4.3 million. In the US, the Virginia Tourism Corporation estimates that the state receives a return of 700% for every dollar spent on advertising. Notably, in comparison to countries with similar products, Jordan has not allocated sufficient funds for marketing and promotion, which is a primary issue that must be addressed.

Another serious issue is that tourism in Jordan ebbs and flows with waves of regional instability. The industry is suffering as a result of the Intifada and by 9/11. Over the past 9 months, numerous international operators have cancelled their reservations. Other than during Eid, when domestic tourism surged, many hotel vacancy rates hover at 85% and local tourism operators are on the brink of bankruptcy.

B. Comparing Chemonics's Past Findings with Today's Tourism

Chemonics has worked in Jordan for nearly 10 years, and has repeatedly stressed that preservation in addition to promotion, the quality of life of tourist host communities, and the quality of the visitor experience are primary tourism issues. Some aspects of the tourism sector have dramatically improved including site management, begun under the UNESCO Petra project and USAID's Jordan Sustainable Tourism Development/Sites and continued by MOTA with the US National Park Service.

Infrastructure including sewage waste treatment and provision of hotels has dramatically improved in Amman, Petra, Aqaba, and the Dead Sea. However, the hotel market is now over-built in Amman and Petra, with the supply significantly exceeding the demand. This problem may also be encountered at the Dead Sea, where the Government Rest House, Movenpick and Dead Sea Spa Hotel operate, the Marriott is opening, and RSCN is creating a camp. If marketed properly, Dead Sea tourism will be well served by these facilities.

Although there are plans to build market attractive hotels near many of Jordan's important sites, such as Jerash or Irbid, Madaba, Umm Qais, Ajloun, Wadi Rum and Karak, they have not yet come to fruition. There are local hotels in Madaba, but tour operators complain that they are expensive and lower quality. Zara is perhaps building a hotel near Umm Qais, although the location has been controversial, and RSCN is building a camp near Ajloun. At Wadi Rum, Zara is building a luxury camp outside the reserve's borders, and the community camp inside the reserve is being improved with the assistance of RSCN.

Due to the lack of adequate accommodation near the tourist sites, tourists often stay overnight in Amman and embark on day-trips to nearby sites, particularly to sites in the north. As a result, there is less interaction between tourists and communities, and therefore less incentive to create community activities and less opportunity for tourists to support it. Tourists perceive 4 nights in Amman as indicative of a smaller, less diverse and less interesting destination (add-on only, not stand alone), appropriate for a reduced 3-5 day length of stay.

Visitors continue to complain of many of the same problems that Chemonics identified in 1993 and 1997, including lack of the following: interpretation and signage, transportation to and at sites, adequate visitors centers and museum shops, appropriate handicrafts, and guide training.

Although site presentation and interpretation have improved at Petra, Madaba, and Qusseir Amra, with its impressive new visitors center, many sites such as Jerash, Kerak, and Aqaba are still relatively without educational way finding. At Aqaba, however, the Gensler Master Plan for ASEZA includes interpretive signage.

It is still nearly impossible for tourists who visit Jordan's most popular site, Petra, to do a one way circuit, allowing them to leave the site at its logical exit point near the Basin Restaurant, either via Global Electric Motorcars (manufactured by Daimler Chrysler, \$10,000 each, and being used for zoo tours in the US), mini bus or RSCN style jeeps. This continues to discourage second day visits, as tourists, young and old alike, don't have the energy in the hot sun to walk round-trip through the Siq.

The visitor's center at Petra is sub-standard, and some of the sites lack adequate museum shops and cafes, which can generate extraordinary revenues. For example, the Metropolitan Museum of Art in New York produced nearly 3 times as much revenue from its museum shop and café as from its next largest source of income, admissions and membership fees. This continues to be a lost opportunity in Jordan.

Handicraft shops are prevalent in Amman, but their locations are often a mystery to tourists, as the hotels do not promote Amman tourism. Unlike most international standard hotels in capital cities, Amman's hotels offer no information about Amman's cultural and current events, at least not on a continuous basis. The visitor has to seek it at the bookshop or in galleries.

In addition, on guided tours visitors are often taken to lower quality handicraft shops which pay higher guide commissions, often as much as 40% split between the guide and the driver. Al Aydi, for example, is fabulous both for its architecture and handicrafts, yet tourists often don't see it because Al Aydi has a policy that precludes commissions. Businesses should be able to operate competitively, and not be forced to either pay commissions or lose sales.

Many NGOs offers handicrafts throughout the country, but their designs rarely change, and there is no local, site specific or community identity of products. Each shop is like an international chain of products. Communities, such as Wadi Mousa and Umm Sayoun, are not trained to offer authentic handicrafts other than sand bottles at Petra, and they continue to promote items from India and China, lacking in authenticity, which tourists don't want. Zara's, Silsal's and RSCN's products evolve with authenticity.

The quality of guide training at Ammon College continues to seek strengthening, as other well crafted university programs begin to emerge to increase competition. There is a strong need for language skills and specialization in guide training, as well.

In 1993, Chemonics International prepared a study for USAID on a Tourism Marketing Strategy for Jordan. Nearly ten years later, its findings are still valid, and some but not all recommendations have been met by JTB. The study advocated targeted press releases, a damage control strategy for political disruptions, and high impact/low cost earned media articles. JTB is targeting the international media, and it has a damage control strategy which Jordan's international hotel operators believe is effective. However, JTB needs to strengthen its media/communications staff, as JTB's Managing Director, Marwan Khoury, recommended. In addition, an effective strategy for creating earned media articles needs to be implemented.

The study also advocated an advertising strategy that would create an image of Jordan as a world class destination, targeting France, Italy, Germany, and UK (23% of tourists arriving in Jordan in 2000 were from Europe, mainly France, Italy, Germany, UK and Spain). The study recommended one fam trip per year to each primary market followed by focus groups and participation in two European trade shows (ITB/Berlin and the World Travel Mart in London). JTB has exceeded these recommendations. It is evident that JTB is effectively targeting the European market; however, its advertising strategy for other markets is weak.

Although nearly every study conducted in Jordan recommends visitor surveys, there does not seem to be a consistent effort on the part of MOTA or JTB to implement a regular strategy for understanding visitors' needs.

Chemonics strongly advocated networking, professional development seminars, public awareness, educating local governments and tribal leaders in tourism, and private sector involvement. Networking has improved both within the government and between the

government and private sector, and AMIR has supported professional development seminars and public awareness activities. But community involvement is still limited.

JTB lacks target marketing and positioning. Although the European market is well covered, the Gulf should receive a major promotional campaign and North America should experience a well-targeted campaign focusing on niche markets. The North America strategy should include well placed small ads in Sunday travel sections of major US newspapers and one or two major travel magazines (such as *Gourmet*, *Conde Nast Traveler's* annual Gold List issue, or the annual "*Sophisticated Traveler*" magazine issue of the New York Times). JTB primarily organizes familiarization tours and trade fairs, which it does an excellent job in, according to participants. However, the JTB needs to expand its marketing strategy to include ad campaigns and road shows in new markets. Part of JTB's hesitation to expand its market strategy, incorporating new markets and a more diverse promotional campaign, is based on budgetary restrictions.

In 1997, Chemonics International prepared a study for the emerging Jordan Tourism Board, encouraging a National Strategy that would bring together the 7 ministries, which at that time were involved in tourism, and a number of NGOs. Today there appears to be greater communication; however the degree of success in ministry coordination is unknown. Although institutional strengthening of MOTA/JTB and improved cooperation between the public and private sectors in hospitality training has occurred to some degree, this area still requires further assistance.

The 1997 study recommended creating a database through improved research/statistical analysis capability including information on international tour operators, which JTB is advocating in order to improve their visitor knowledge and benefits to their membership.

A number of recommendations listed in the 1997 study have not yet been implemented; including, 1-3 day tours for business travelers (which currently are not being targeted), tourism and cultural event promotion in hotels, promotion of urban authenticity, and creation of an historical district walking tour in Amman to recognize the city's post 20th century architectural significance and downtown vibrancy and cultural life.

Chemonics also suggested the creation of a film commission office, to take advantage in an organized fashion of film companies' temporary investments on sites, with standardized regulations and rates to protect the antiquities. This could be a department within JTB, with the objective of promoting Jordan as an exceptional location for film and video production. A trained JTB staff member would work with local communities, site managers, producers and crew members to select locations and ensure a positive experience throughout production.

As an example, Virginia has had a Film Office since 1980. Using an economic multiplier of 2.12 to include both direct and indirect benefit, Virginia estimates the total impact from that office over the 20 years since its inception is \$862 million.

Chemonics also advocated coordinated investment in tourism, and through strengthening of the Jordan Investment Board and the ASEZA “one-stop-shop” concept, USAID has facilitated this. It is essential for JTB to become part of the actual process, as the marketing of successful tourism is critical to foreign investors. Chemonics encouraged identifying corporate and non-profit, non-governmental funding sources for long-term sustainability, which is now being advocated by USAID’s Global Development Alliance and by AMIR.

Diversifying the tourism base was advocated through targeting of Christian and Islamic religious sites, educational study tours, and increased numbers of events/festivals. MOTA and JTB began this process through their promotion of not only archaeological and historical sites, but also religious and nature sites. Now it is time to expand this effort even further.

Lastly, Chemonics recommended in 1997 that JTB embark upon a major print media campaign. Fulfilling this need is more critical than ever, in order to convince the world that Jordan is a safe haven for adventurous, educational, and exotic tourism.

C. Findings of AMIR 2.0 Tourism Study

AMIR is targeting JTB to become even more pro-active and sustainable in the months and years ahead in order to grow the national economy. The purpose of the AMIR 2.0 Tourism Study is to create a Work Plan under which AMIR 2.0 can effectively assist JTB. The goal is to provide the technical assistance, institutional strengthening and capacity building, training, funding, equipment, etc. that JTB needs to become the region’s most successful tourism organization. In addition, AMIR’s objective is to strengthen Ammon College by developing relationships with the private sector, such as Marriott, and well-known US universities such as Boston University with hospitality management programs. AMIR will work with Ammon to select a US partner, develop curricula and faculty skills, and increase industry linkages.

AMIR has also broadened the definition of tourism to include new sub-sectors, which with proper promotion will have a very positive impact on the national economy.

In order to ascertain JTB’s needs, Chemonics did extensive background research in the US and Jordan and interviewed dozens of key players in the tourism sector during a February, 2002, field visit. Those interviews are detailed in Volume II of this Report.

Interviewees included:

- US Agency for International Development,
- Jordan Tourism Board,
- Ministry of Tourism and Antiquities,
- the Ministers of Health and Higher Education (regarding the emerging tourism sub-sectors of Medical/Health/Wellness Tourism and Educational Tourism),
- associations whose members are hotels, restaurants, and travel agents/tourism operators, including a conference and a roundtable with the latter,

- a graduate of the Ammon College for guide training,
- conservation organizations including the Royal Society for the Conservation of Nature and the Royal Ecological Diving Society (Eco/Adventure Tourism),
- university presidents of Jordan, Hashemite, and Yarmouk (regarding language, hospitality and guide training programs under Educational Tourism),
- network linkages such as the World Trade Center which is interested in promoting regional Gulf and Business tourism,
- festival organizations including Jerash, Jordan's premiere festival event,
- international hotel managers,
- and the High Commissioner for the Aqaba Special Economic Zone Authority regarding tourism's links to the city and to foreign investment.

The formal launch of the Jordan Tourism Board as a public-private partnership in 1998, after nearly a decade of organization, independent from but coordinated with the Ministry of Tourism and Antiquities, was an important step in developing effective private-sector led tourism promotion. The JTB's 13 member Board of Directors, headed by the Minister of Tourism and Antiquities, includes 9 private sector Board members representing hundreds of hotels, travel agents/tour operators, and transport companies. JTB has a Managing Director and 16-17 staff. It has support from 9 contracted marketing offices around the world. In the year 2002, the Jordan Tourism Board has become an established, successful public/private partnership.

All parties interviewed believed that Marwan Khoury was an effective manager operating with very limited resources. Under his leadership, marketing of Jordan has become much more sophisticated, particularly in the European market, where JTB is doing 20 trade fairs a year in addition to workshops and familiarization tours. Numerous brochures have been well designed. Associations have formed and networking is understood as important. However, due to budgetary and other constraints, all including Marwan recognized that staffing is inadequate, particularly in marketing, statistical analysis/research, media/communications, and events planning.

AMIR 2.0 has confirmed that although JTB has come a long way and been remarkably successful, in order to fulfill its mandate to increase the number of visitors and the duration of stay (now 4.5 days for Europeans and 2.7 days for North Americans), and to have a proper promotional campaign of Jordan, JTB will require technical assistance, capacity building, supporting policy reform, and an increased stable budget.

Although JTB has a marketing plan, 90% of those interviewed believed that the country requires a national tourism strategy and JTB needs a strategic plan so that decisions are not made in an ad hoc fashion. As JTB's Marketing Plan 2001 states, "A successful organization is one that develops an appropriate strategy to reach its goals, builds an appropriate organizational structure to carry out the strategy, and equips the organization with effective systems of information, planning, control and reward to get the job done." Although JTB does not have a strategic plan, its marketing plan (pages 29-32) does include strategies.

JTB itself advocates that there is a need to institutionally strengthen its staff through hiring new talent and training staff in marketing, communications/public relations, press/media, events planning, research and statistical analysis/national data base, and enhanced IT/web based solutions.

JTB is also very concerned about its budget, as the government did not actually allocate the amount that was promised for 2002, and increased financial sustainability is a major goal. JTB's Action Plan is based on a budget of 9 million. JD8 million from the government, JD500,000 from the private sector, and JD500,000 from membership dues, trade fair participation and interest income.

Unfortunately, the actual budget for 2002 is less than 5 million, JD4 million from the government, one-half of what was anticipated, and 800,000 from the private sector.

Specifically, interviewees complained that JTB lacks sufficient and accurate promotion in certain markets, including the Gulf, North America and Asia, and the domestic market. They believe that the national image of Jordan as a safe, flexible (stand alone or add-on regional) destination is not adequately projected. JTB needs to increase its multi-dimensional approach to marketing.

Target marketing remains an issue. The Gulf (throughout) and the neighboring Arab region (Lebanon, Palestine, Syria, Iraq, Iran) is a vast market, requiring different approaches for success. The profiles of Arab v. non-Arab tourists differ dramatically.

Arab tourists arrive via road, while non-Arab tourists fly into Jordan. Arab tourists visit in the summer, many to escape the heat of the Gulf, while non-Arab tourists prefer to visit in the Spring and the Fall. Arab tourists stay for extended periods of time, an average of 9.7 nights, and prefer to stay in furnished apartments. Non-Arab tourists, if they are European, stay for 4.27 nights (Americans 2.7 nights), and stay in hotels.

Arab tourists are younger (half are under 30) than non-Arab tourists (30 percent are over 50). Arab tourists are looking for recreation, entertainment, and medical treatment, and they spend an average of \$1264 average. Non-Arab tourists are interested in Jordan's cultural heritage, and they spend an average of \$706 per person. However, considering that their stay is less than half the average Arab tourists, non-Arab tourists spend more.

According to JTB's Marketing Plan 2001, JTB determined prior to 9/11 that the US, along with the Gulf and Europe, was a primary market. Canada, Sweden, Japan, Indonesia, Malaysia, Israel and Lebanon were seen as secondary markets. The rest of Scandinavia, China, Ireland, Greece, South Africa, Australia, and Korea were seen as tertiary or markets of opportunity.

Although it is expensive to target the North American and Asian markets, Americans (US), Canadians, Japanese, Singapore (reported to be a large part of the recent Eid visitation at Petra), and Malaysia remain a huge market and the top spenders in tourism, along with Jordan's targeted European market of Germany, the UK, France, Spain, Italy,

the Netherlands (strongly adventure oriented tourists), and Austria and Belgium. Individual tourists need to be tapped through promotional advertising campaigns.

Other markets that deserve more promotional attention include Scandinavia, the Far East (China, Korea, Taiwan, Hong Kong, and Thailand), and Australia/New Zealand, the latter particularly in regard to individual and adventure tourism. Israel, with its proximity, is an obvious market in the future.

All, including JTB, advocated improved WEB marketing, which has begun under an EU grant (attached to funds for Umm Rassas), and promotion and sector linkages to create a more diverse product, including religious (Islamic and Christian), educational, medical or health/wellness, business, eco or adventure, and heritage tourism.

Although public awareness has greatly increased, communities continue to hunger for more training and economic benefit from tourism. AMIR reports note that microfinance and tourism share many of the same challenges in Jordan, i.e., expanding access to underserved and rural areas, particularly in the north and south. USAID has funded 50,000 micro-enterprise borrowers and has been assisting many small woman-owned businesses. (Community based micro-enterprises that are directly impacted by tourism can include agro-tourism/food production, restaurants/cafes, small hotels/B&Bs, artisans/handicraft production, furniture makers, jewelry and metal workers.)

POLICY REFORM: This remains an issue for the government in the areas of:

- JTB's Budget – For the year 2002, the government promised JTB JD8 million but only gave JD4 million, 80% of its total budget. The private sector, comprised of hotel, transportation, travel agent and tour operator members, provided an additional 800,000 JD or 20%. This lack of a reliable budget negatively impacts JTB's advance planning (600,000 JD are spent annually on CDs and brochures). JTB advocates a policy change to the government, i.e., the Central Bank would provide 1.5% of all tourism receipts. Further, JTB requests that the government change the appropriation from a line item to a grant, so that the rules of procurement – favoring lowest price over highest quality – do not negatively impact JTB's marketing. (Note: Total tourism receipts in 2001 were JD550 million, so would have received close to the requested JD8 million rather than 4 million from the government.)
- Visas – for normal tourists advocate 1 month v. 2 weeks eliminating hassle, special visas for medical tourists might be necessary (e.g., up to three months, more than 3 months, numerous visits, etc.).
(The US Consular Information Sheet now states: "Foreigners who wish to stay 14 days or more must register at a Jordanian police station. Failure to do so subjects the traveler to a fine of \$1.40 per day." This is an incredibly negative p.r. message, and the current policy is a disincentive to extended lengths of stay.)
- Ministry of Health and Medical Promotion Board (MPB) – The MPB should create standards for medical care rather than promote tourism. JTB currently

has 2 seats on the Medical Promotion Board; rather advocate that the MPB become a medical standardization board, that the Ministry of Health not open a promotional office at the airport, and that both give promotional responsibility to JTB and take seats on the JTB rather than vice versa.

- Domestic Tourism – Move promotional responsibilities from MOTA to JTB.
- Festival Tourism – Analyze moving the Jerash Festival from the Higher Committee to the control of JTB both for events planning and management and promotion, in order to facilitate advanced planning, self-sustenance and profitability.
- Public Security Information – Change what appears to be a gentleman's agreement into a formal regulation that allows the Public Security Bureau to provide JTB with visitor statistics based on official border entries.
- Driver/Guide Issue – Change regulation so that certified guides can also act as drivers, as they do in Kenya and other countries, which better facilitates individual tourists and small groups.
- Guide Training – Advocate that the government legislate standards for certification and specializations, and offer refresher courses for licensed guides. Re-visit the issue of whether or not guides should be required to hold college degrees before attending Ammon College.
- Petra – Eliminate the requirement that visitors automatically pay for horses in addition to their entrance fees. Seek market sensitive ways to train and employ Wadi Mousa horse owners.
- JTB should formally become part of Vision 2020

With regard to US policy and the Consular Information Sheet for Jordan, which many prospective tourists read on the Web, there should be a statement that “Jordan is a safe destination.” Unless Americans believe this, they will not look further for the region's 12 climatic zones, rich archaeological sites, 150 sites from the Old Testament, etc.

Generally, guide and hospitality training, including Ammon College, needs improvement, and there are many areas in which AMIR can offer capacity building and strengthening, including assistance with standardization and specialization. In order to promote tourism diversification, AMIR believes that new tourism sub-sectors require immediate assistance, including Educational, Health/Wellness or Medical, Family/Domestic and Regional, Adventure or Nature/Eco, Business, and Heritage. Educational and Health/Wellness or Medical Tourism offer Jordan expansive opportunities for foreign revenue that would be less impacted by regional political instability.

Jordan has invested in education, and that smart investment has paid off in terms of increasing literacy rates, now averaging 87%. Jordan has also introduced computer based learning to public schools where 71% of all students are enrolled, and the schools are teaching English, as the language of international business, from the 1st grade forward. Jordan offers 10 public universities and 12 private universities. However, at a time when Jordan needs to increase its human capital skills in a rapidly changing global world, education is becoming a less attractive investment domestically, as huge numbers of graduates are unable to find employment.

Therefore, the education sector needs a clear national strategy, focused on future employment opportunities. The sector also requires improved cooperation with the business community to provide job experience through internships, and improved coordination amongst universities. On the other hand, Jordanian universities also need to promote themselves better internationally to bring in foreign revenue to their already established programs in business, medicine, dentistry, pharmacy, engineering and architecture, and to new programs in tourism. Jordanian universities are affordable to many international students, although they pay higher tuition than domestic students. This increased revenue could subsidize university needs such as infrastructure and increased pay for public university professors, who are currently seeking employment at higher paying private universities.

According to the Minister of Higher Education, 13,000 international students are studying in Jordan, mainly from the Gulf region. Saudi Arabia has been identified as being the most important market, with 1,500 Saudis currently studying in Jordan. The students and their families contributed \$20 million to Jordan's economy last year, on expenditures for flights, telephone, food, gas, rent, restaurants, and entertainment. This new tourism sub-sector provides Jordan with an incredible opportunity to increase foreign revenue, as foreign students pay 4-5 times more than the tuition paid by Jordanians.

The sub-sector of Health/Wellness or Medical Tourism is growing all over the world. For example, the Hawaiian Islands are launching a major effort to promote medical tourism, and the US Department of Commerce is providing the state with \$400,000 in federal seed money.

In Costa Rica, which is ranked by the World Health Organization, as among the top 20 finest medical systems in the world, the medical community and the Costa Rica Tourist Board joined forces to create the Health Tourism Corporation (HTC) of Costa Rica, as the most appropriate gateway through which a medical tourist can access Costa Rica's medical system. The HTC web site provides information on physicians and infrastructure, and work through a local travel agency to provide foreign access to Costa Rica's health care.

India is also promoting its medical industry. For example, Thakur Tours specializes in medical tourism. They offer access to health care, as well as travel arrangements, visits to cultural sites, and lodging.

In Penang, Malaysia, which receives about 300,000 foreign medical tourists a year, the state government is introducing a Medical Tourism Trail as part of its promotional efforts. The Trail, which would be promoted to neighboring Asian countries such as Indonesia, Cambodia, Burma, and the Philippines, would incorporate the 8 private hospitals in Penang. Its objective would be to sell the concept that Penang hospitals are just as good as neighboring Singapore's and much less expensive.

Medical Tourism is an industry that encompasses many different aspects of tourism including the following:

- medical care for foreigners, including traditional and non-traditional remedies;
- travelers emergency medical needs, which will become a growing market with the increase in adventure travel;
- medical research/care holidays sold to international doctors interested in practicing in exotic locations;
- medical students interested in international study in foreign locations; and
- health/wellness tourism such as Dead Sea spa facilities.

Health tourism is an ancient concept, as travelers have been leaving their homes for hundreds of years in search of specific medical treatments. Patients and their families or doctors and students would choose Jordan for a number of reasons: it is a pleasant, healthy place with comfortable Mediterranean climate, it has excellent facilities and medical practitioners, and it offers reasonable prices. The largest target market is the Middle East region and North Africa, which can quickly access Amman's well-equipped modern clinics and hospitals.

In the year 2000, JD500 million were spent by patients from abroad according to the Ministry of Health. However, between 1998 and 2000, medical tourism fell by approximately 15% in Jordan, due to increased competition in neighboring Middle Eastern countries and insufficient marketing. AMIR can assist the industry in creating a well organized strategy and system for attracting medical tourists. AMIR can also help to facilitate transparency by supporting the Ministry of Health and its Medical Promotion Board to create standardization of rates and to publish a directory of care providers and their qualifications, to publish a booklet, "Visiting Jordan for Medical Treatment," and a web site, educating patients and linking them to the appropriate care before they arrive.

Jordan can become a larger part of regional and international conference tourism, such as the World Medical Assembly, the Congress of the International Society for Organ Sharing, or conferences on specialty fields such as clinical biochemistry or adolescent psychiatry. All of the aforementioned are being held in India during 2002-2003. In addition, AMIR should work with JTB to become the lead promoter of Medical Tourism in Jordan, establishing promotional linkages on JTB's web site with the Ministry of Health, the University of Jordan Medical School, the Association of Hospitals, the Association of Doctors, and the wellness spa industry. AMIR can also assist JTB to create trade missions to sell all aspects of health care knowledge and service.

AMIR should also work with JTB, MOTA, and Jordanian tour operators to increase promotion of the sub-sector of Religious Tourism. There are a number of tourism operators who are offering both Christian and Islamic tours, and their efforts could be strengthened. Because there are so many important Christian sites in Jordan, some churches have emerged as active participants in attracting large-scale Christian delegations from the United States, Europe, and the Far East. Jordan hosts an array of important Islamic sites, and the country is strategically located on the historic path of

Islam. The Holy Sites of Medina and Mecca lie 400 miles south of Jordan, and Jerusalem lies 20 miles west of Jordan's border.

With the goal of encouraging religious tourism, USAID supported the layout, editing and typesetting of a comprehensive reference book in English and Arabic called The Holy Sites of Jordan, published by TURAB in 1996, which illustrates nearly 50 important Islamic sites. Jordan also houses dozens of Christian sites including numerous excavated Byzantine churches. As facilities improve and cater to specific needs, such as the Iranian Shi'ites on their pilgrimage in Jordan, and as promotion to appropriate target markets increases, so will this important sub-sector grow. AMIR can most efficiently assist Religious Tourism by helping tour operators understand how to sell the product and in which international markets to target their efforts.

The sub-sector of Family/Domestic and Regional Tourism will grow with time, particularly in regard to the non-peak, summer period when Gulf tourists escape the heat and stay in Jordan for extended periods of time. In Egypt and Africa, Abercrombie and Kent has seen a 30% increase in family travel over the past year. The economic benefit of this sector can be extremely important during politically unstable times. For example, while Jordan experienced a total decline in tourism of 15% between 2000 and 2001, Jordanian tourists increased by 22% (380,000 to 466,000). His Excellency Minister Refai noted that this is not only important to the economy, but also Jordanians will become better hosts when they understand the tourist's perspective.

Although not classified as a sub-sector, the Aqaba Special Economic Zone (ASEZA) fits within many different types of tourism (domestic, family, business, ecotourism, with links to medical and educational programs). As Jordan's only beach tourism with a number of historical and archaeological sites, Aqaba is an important engine for development of tourism infrastructure and increase in the number of tourists. It can also emerge as an attractive destination for cruise-liners.

Duty free and special economic zones are emerging around the world, as a way for governments to create employment in the private sector by attracting new investment. Jordan is competing with many countries around the world and some regionally, such as Dubai, Egypt, Morocco, Israel, and Sudan. As Jordan grows its high tech educational system, it can promote not only manufacturing but also technology for foreign markets.

ASEZA offers global businesses investment opportunities within a 375 sq kilometers area. Its infrastructure is equipped with modern utilities including electricity, wastewater treatment and fiber optics. Incentives offered to investors include streamlined business registration and licensing, simplified foreign work permits and visa requirements, exemption from the social services tax and the sales tax on the final consumption of all goods except for a 7% sales tax on certain items, no annual land and building taxes, exemption from customs duties on imports except cars, no restrictions on foreign currency or on repatriation of capital and profits. Within the ASEZ is a Qualified Industrial Zone. Products manufactured within this zone are duty-free and quota-free to the United States, European Union, and some Arab countries.

AMIR has the opportunity to work with JTB and ASEZA, and with JREDS and ASEZA, to promote Aqaba as a diverse, authentic community in which foreign investors and manufacturers would want to invest, as a primary tourism destination, competing with other premiere waterfront tourist destinations such as Malaysia, Jamaica, and Mauritius.

ASEZA is working to develop entertainment venues in Aqaba that would be attractive to investors and international companies (IMAX theatre, golf, casino, perhaps a Legoland type theme park, duty free shopping). With careful environmental preservation and cultural sensitivity, these efforts aimed at improving Aqaba's day and nightlife should be supported.

AMIR should support joint promotional efforts between ASEZA and JTB to draw the domestic family market during the winter and the Gulf market during the summer through assisting hotels in marketing family services such as baby-sitting, sun and sand, horseback riding, hiking, etc. All family tourism whether Arab or Western should eventually be marketed as "trips that are good for kids are also fun for grown-ups."

The sub-sector of Adventure or Nature/Eco Tourism is rapidly moving forward under the Royal Society for the Conservation of Nature. RSCN and JTB have begun collaborating, and RSCN has been chosen as their in-bound adventure tourism manager. They will provide tour operators with group or net rates, cooperative marketing, trained operational staff, pre-advance bookings, advance notice on tour products, and client surveys.

Interestingly, RSCN's market has grown to 50% domestic tourism and 50% foreign, primarily European. In 1993, RSCN had 2000 visitors at Dana. Last year they hosted 60,000 visitors. The RSCN is also active in Shamauri, Azraq (bungalows), Wadi Mujib (camp), Wadi Rum (managed camp site), Wadi Feinan Lodge, Ajloun, Dibban, and Yarmouk.

There is tremendous opportunity to promote exotic trips for eco-tourists with a wide array of international tourism operators, including groups like Forum International of California, which coined the term ecotourism in 1965; Discovery Initiatives, a British agency dedicated to conserving and sustaining local economies; G.A.P. Adventures, a Canadian company focused on developing countries; Geographic Expeditions, a very sophisticated US company; and Wilderness Travel. There is also a large, nature-based non-profit organizational market, such as the World Wildlife Fund and Earthwatch, zoological societies, botanical societies, conservation organizations, and major universities. JTB should become part of the one-stop resource for thousands of adventure tours called the Specialty Travel Index, and Eco-volunteer, a non-profit Web-based collection of research or conservation projects seeking volunteers.

With regards to Business Tourism, in addition to assisting ASEZA, AMIR can provide a 1-3 day tourism itinerary for the many business tourists who arrive in Jordan, including the hundreds of consultants who work for international donors.

Heritage Tourism, an area that is growing by leaps and bounds on the world market, is another area in which AMIR can provide some assistance as detailed in the work plan.

In accordance with JTB's goals, it is time to enlighten the world as to Jordan's safe and welcoming environment, its highly educated population, and diverse and extraordinary tourism products. Jordan must be promoted as an all-purpose destination with a fabulous Mediterranean climate, an ancient layered history, rich in cultural and religious heritage for Moslems and Christians alike, abundant in natural beauty and adventure tourism, in addition to and featuring state-of-the-art educational, medical, and business tourism opportunities.

Now is the time to promote Jordan and position the country for a diverse, all encompassing tourism, one that protects against economic deprivation due to political instability in the region. It is also time to strongly advocate Jordan as a unique destination, one that is as attractive to local and regional markets as it is to international travelers and investors.

D. WORK PLAN 2002 - SPECIFIC RECOMMENDATIONS FOR AMIR FUNDING

The following detailed Work Plan 2002 addresses many of the issues identified under the Executive Summary (A – C). It illustrates a range of possibilities that are intended to assist Jordan in moving forward, quickly in the short-term and more strategically in the long-term. These tools will also strengthen JTB through building its staff capabilities and its capacity to strategically plan and promote tourism, and either move it into new market segments or improve existing segments.

1.0 Planning and Assessment

1.1 Develop National Tourism Strategy with MOTA and JTB

“Commemorate the better angels of our nature...” Abe Lincoln

Promote what is unique and sustainable in a world of homogenized culture and an era of managed remoteness and planned romance. Authentic places give national identity. Create a strategy to guide overall tourism development, based on long-term cultural and environmental preservation, as well as community economic development. Include regional tourism strategies within the national framework.

- Bring in facilitators to create a workshop within which MOTA, JTB and stakeholders (including community representatives, NGOs, other government agencies, and tour operators) can effectively communicate.
- Use the REACH approach as guidance. Analyze existing strategies, such as RSCN's for ecotourism. Review existing national plans created for MOTA – the French, German, Japanese, and whatever else.
- Work with stakeholders to create one document (through revisions and editions), and get all parties to sign off.
- Create implementation strategy.
Start date: May 2002
Completion date: June 2002
Facilitator: EPI/Ecoplan International
LOE: 30 days (5 US pre-field, 15 field, 10 US)
Technical Advisor: Sandra Chesrown, CMI
LOE: 10 days (review existing documentation including example of Ireland/discuss AMIR Jordan Investment Board's review of Irish model, Tunisia, South Africa, Morocco, Vakavanua, Fiji, and Virginia Tourism Industry Vision Plan, brief facilitator in US, participate in workshops in Jordan)

1.2 Develop Strategic Plan for JTB

- Bring in outside consultants to assist JTB with creating a 3 year strategic plan.
- Ensure that the strategic plan contributes to JTB's operational and financial sustainability and follows the National Tourism Strategy.

- Interview all staff; ensure the presence of realistic, measurable work plans.
- Broaden the tourism sector to include sub-sectors of Medical (Health/Wellness), Educational, Religious/Islamic and Christian, Nature or Eco/Adventure, Domestic/Family and Regional, Heritage, and Business.
- Analyze tourism in relation to investment (review new law due this month from the Royal Commission on Investment).
- Include monitoring indicators to evaluate success and sustainability – goal to make Jordan into a flexible destination, either a 3-5 day tag-on or 8 plus days stand-alone destination (take advantage of independent and regional markets).
- Review tourism indicators (such as ICIMOD and WTO).

Start Date: June 2002
Completion Date: September 2002
Technical Advisor: Dr. Elayne Gallagher
Technical Advisor: Sandra Chesrown, CMI or James MacGregor
LOE: Requires conversations with technical advisor

EXAMPLE OF RECOMMENDED STRATEGIC PLAN PROCESS

Working with JTB, the technical advisor could use JTB'S own SWOT analysis as a framework, as it identified strengths and weaknesses (see Appendix III).

Declare intent – where JTB wants to be in the short and long-term---^Analyze position --
--^Pinpoint competitive advantage----^define scope of products and markets----^decide
where to focus resources----^identify, prioritize and implement change----^monitor
performance and review strategy for measurable results. Focus on the present to achieve
the growth you need now, but keep one eye on the future.

Phase I – Analyze – Collect information to make informed decisions. Analyze internal capabilities (staffing/discuss issues with staff, spatial and technological needs and information systems), external needs (e.g., policy reform), what customers want, and the competition (obtain their promotional material). Map out a clear statement of strengths and weaknesses and training needs.

Phase II – Plan – Define goals (statement of purpose). Assume both short-term and long-term revenue growth is high priority. Determine product advantage (image/authenticity). List products and services in demand now and how that might change in the future. Be proactive. Set boundaries. Group products. Plan what not to do as well as what to do.

Choose markets (and customers) to develop. Choose markets to leave. Segment market by region, growth potential, value. Give up the shotgun approach. Invite customers to be part of a planning session. Discover their interests re product and pricing. Understand network of strategic linkages with stakeholders and other organizations. Establish an effective feedback mechanism. Focus on the positive aspects of change. Estimate a budget. Forecast revenue for years one, two, and three.

Phase III – Implement – Learn new skills. Make organizational changes. Change for the future while maximizing performance NOW. Break down projects into written action plans with objectives, responsibilities, deadlines, contingency plans where possible, and measurable results. Set aside one day each month to maintain and continuously develop the Strategic Plan as an organizational team. Monitor results against your targets (e.g., 10% annual increase in tourism receipts from a benchmark).

2.0 Capacity Building and Institutional Strengthening (reference to BMI WP)

2.1 Strengthening Business Associations

- 2.1.1 Incorporation of JTB and its member organizations, the Jordan Hotels Association and the Jordan Society of Tourist and Travel Agents Association, in the AMIR March Business Association management training sessions at the Dead Sea. Recommendation: that the emerging Restaurant Association and the Association of Private Hospitals be added to later sessions.
- 2.1.2 Send JTB members and association leaders on study tours in US, e.g., one week training course in leadership and management offered by CIPE and US Chamber of Commerce
- 2.1.3 Strengthen Jordan Society of Tourists and Travel Agents/Tour Operators Association (JSTTA) – encourage new programs in sub-sectors. Support FAM trip to Malaysia and North America. Create self-marketing structure (web/brochures). Web site might include Why Jordan?, Attractions – categorized, Explorations Itinerary, Reserve Your Trip Today, Links, Contact Us, etc.

2.2 Strengthen JTB – Management and Staff

- 2.2.1 Staff Study Tour to Morocco Tourism Board and Cyprus Tourism Organization
Start/Completion Dates: Summer, 2002
Technical Advisor: James MacGregor,
Morocco Specialist
- 2.2.2 Management Study Tour to Promote Health/Wellness Sector
Send Marwan Khoury on an executive program to the Harvard JFK School for, “The New World of Health Care,” to learn to “talk the talk” of medical or health/wellness tourism.
Start Date: April 27
Completion Date: May 5/conference
May 20 report to AMIR

2.2.3 Assess Communications/Media Operational Effectiveness

Survey staff needs, determine whether can train existing staff or recommend new international staff to train others; review appropriateness of affiliations of 833 press people JTB brought to Jordan last year; assess methodology to create better relationships with newspapers, guidebook editors, airline periodicals, travel magazines, major newspapers, television, etc. and project more positive information (such as Mediterranean climate v. hot and dry); assess media visits and press trips.

Start Date: May
Completion Date: June
Technical Advisor: Rami Khouri
LOE: 20 days
Crisis Management: Nick Conte, Woods, Rogers & Hazlegrove
LOE: 10 days

(With a limited budget, JTB requests funds for one year of salary for international staff director who can then train staff.)

2.2.4 Assess Events/Jerash Festival Operational Effectiveness

Survey staffing needs and determine whether can train existing staff or need to bring in international staff to train others; assess improvement of Jerash Festival management or need to bring in under JTB umbrella and create method to immediately improve.

Assess opportunities to create and sponsor new events such as pop Arab culture, comedy, handicrafts, agro-tourism - olive oil pressing and cheese making; assess need for JTB Calendar of Events or simple coordination with private-sector led calendars.

Start Date: May
Completion Date: July
Technical Advisor: Ira Rosen, President, Entertainment on Location, Inc. or Ralph Earnhardt, VA Festival and Events Association
LOE: 30 days

If a Director of Events position is created, send to Annual Conference, Virginia Festival and Events Association, February 2003 (3 days of intensive targeted workshops).

(With a limited budget, JTB requests funds for one year of salary for international staff director who can then train staff.)

2.2.5 Create Research Department/National Statistical Tourism Data Base

Survey staffing needs, management and capability to do tourism research/statistical analysis; advocate clear regulation to allow the Public Security Bureau to give JTB visitor information including country of origin, traveling to and from, places visited, length of stays; provide technical assistance to assist with creation of National Statistical Tourism Data Base to create visitor profiles, marketing information, data on economic impact etc. for membership and government benefit; train staff to maintain.

Start Date: June
Completion Date: September
Technical Advisor: Linda Kawar, CDG (created JADIS)
LOE: 60 days

2.2.6 Assess Need for and Design of Tourist Information Center(s)

Survey existing conditions; review JTB's concept for a Center at JTB to provide visitor information; investigate other sites at gateways, museums, etc., create location plans, programmatic and design recommendations.

Start Date: August
Completion Date: October
Technical Advisor: Sandra Chesrown/Dar Al Omran Architects
LOE: 30 days

2.2.7 Assess Domestic Tourism Effectiveness

Survey staffing needs, assess Director of newly created department, determine whether can train existing staff or need to bring in international staff to train others; assess existing programs and opportunities to create new programs, e.g., family tourism, particularly in off-peak periods and holidays; advocate charters to Aqaba, advocate community micro enterprise projects such as agro-tourism (cheese/bread/olive oil B&B); create round-table of tourism operators to enhance public-private partnerships.

Start Date: August
Completion Date: October
Technical Advisor: James MacGregor & Petra Moon
LOE: 30 days

2.3 Institutionally Strengthen Guide Training

- 2.3.1 Complete an assessment of the existing Ammon College program and provide assistance to improve its program.
- 2.3.2 Assess emerging programs at The Hashemite University, Jordan University, and Yarmouk University and RSCN.

- 2.3.3 Do a comparative analysis with other countries, particularly the Mt. Kenya program, South African Guides Association, and Sikkim, India
- 2.3.4 Analyze policy reform issues.
- 2.3.5 Create criteria for a training program and standardized guide regulations for MOTA to use to certify guides.
- 2.3.6 Create Guides Association with an operational code of ethics and on-going educational requirements.
- 2.3.7 Coordinate efforts with MOTA, JTB, Universities (particularly Hashemite which is creating program for environmental specialists), and RSCN to create specialty guide programs focused on emerging target markets such as eco/adventure tourism (bird watching, horticultural, rock climbing, etc.).

Start Date: June
Completion Date: August
Technical Advisor: Jim Sano, President, GeoExpeditions, CA, or Gavin Ford (one of the best guides in the world), or Wendy Corroyer, Expert Bird Guide, both of Abercrombie and Kent, Kenya and Amanda Botha, South African Guides Association, in coordination with Gerry Mitchell, GM, for RSCN
LOE: 60 days

2.4 *Strengthen Ammon College* – Develop relationships with the private sector, such as Marriott, and well-known US universities such as Boston University with hospitality management programs. AMIR will work with Ammon to select a US partner, develop curricula and faculty skills, and increase industry linkages.

3.0 Marketing and Promotion - Assess JTB's current marketing strategies and create an effective plan and advertising campaign.

3.1 *Assess Marketing Department* – JTB requests funds for one year to hire international Director to train staff. Analyze whether one position is adequate or if there should be a Director for the Middle East Market (family/Islamic/educational/health/business) and a Director of the Europe/North America/Asia Markets (adventure/heritage/Christian/educational/business).

Assess adding overseas offices (Jordan has 9 – Malaysia has 29). Jordan is currently represented in its primary target markets: North America/DC, the UK/London, Germany/Frankfurt, France/Paris, Italy/Torino, Spain/Barcelona and Madrid, Belgium/Brussels, The Netherlands/Amsterdam, and the Gulf/Jeddah. Survey need for offices in secondary markets such as Canada, Scandinavia, Japan, Malaysia, and Australia.

Survey staffing needs and determine whether can train existing staff or need to bring in international staff to train others; conduct limited training; assess existing programs and opportunities to create new programs, including charter business.

3.2 *Survey 9 JTB Overseas Reps* - understand needs in the field; also assess methods of promoting tourism through Jordanian Embassies and Consulates.

3.3 *Conduct Comparative Study of Competitors* - study successful tourism promotional models – literature, practices, budget.
(e.g., Cyprus, Portugal, Morocco, Egypt, Turkey)

3.4 *Analyze the Marketing Mix* - product, price, place and promotion.
Know your competitors' pricing strategy. Low price is often equated with low quality. Sell on value to the international market and sell price sensitively to domestic market.

3.5 *Create the Right Image* - Is the publicity projecting correctly? Jordan has an extraordinarily fascinating past and a bright future. It is a year-round destination. It is safe and clean yet exotic. Its people are highly educated, and building a strong future in e-commerce and e. tourism. Its food is delicious resembling nearby Lebanese cuisine but also offering food from around the world. It features architecturally interesting hotels and charming eco-lodges. It has some of the best World Heritage sites, as well as amazing nature sites. It holds numerous Christian sites from the Bible as well as Islamic sites from the Koran.
Does the world understand this diversity?

3.6 *Analyze Buyer Segmentation and Direct Sales* - Review and enhance targeting of international tour operators, organizational group leaders, travel agents, airline sales managers, cruise line managers, charter business, conference/meeting planners through trade shows, sales calls, fam tours, etc.. Create a visitor survey.

3.7 *Analyze and Recommend Merchandising* – Buying patterns and tastes differ between East and West. Differentiate products – provide for both markets.

3.8 *Analyze and Recommend Print Media* - Target individual tourists in the West, to stimulate interest in direct travel or further research via Web or tour operators (national Sunday newspaper travel sections, travel/food magazines, professional publications).

3.9 *Analyze and Recommend Consumer Direct* - Target organizational and other types of tourism, such as educational, health/well being, eco/adventure.

3.10 *Analyze and Recommend Electronic Marketing* - Review JTB web site to be sure it is easy to navigate with linkages to all aspects of tourism and maximizes promotional opportunities.

3.11 *Develop an Advertising and Distribution Strategy* - for domestic tourism and for each international market including MICE and new sub-sectors of educational, health/wellness/medical, nature/adventure/eco (such as RSCN's botanical and bird-watching tours), religious, heritage, business, etc.

(JTB is working with ASTA to promote Jordan as a stand-alone destination; need flexibility to be both 3-5 day regional component as well as longer stand-alone itinerary.)

3.12 *Develop Marketing Materials* – ads, promo video, power point presentation. Work with JTB and RSCN, during this, the UN's International Year of Ecotourism, to create new marketing materials for the Lodge at Wadi Finan and perhaps other camps and a bird watching/migration station in Aqaba, both funded by USAID.

Meet with domestic tour operators and support their private sector packaging initiatives.

3.13 *Hotel and ASEZA Promo/Events* - Coordinate with Hotel Association to be sure they provide calendar information (events) to JTB and that they include marketing materials in their rooms on a continuous basis, and that they direct visitors to JTB for further information. Coordinate with ASEZA and Manuel Knight.

Start Date:	July
Completion Date:	December
Coordinating Advisor:	Tom Lloyd
Technical Advisor:	Marketing Firm with branches that understand target markets such as Leo Burnett Casablanca for Europe/N. America Leo Burnett Tokyo or Singapore for Asia Leo Burnett Gulf for Gulf/Regional Tourism
LOE:	to be determined with advisors
Cost:	Note: Primary component of work plan!

4.0 Enhance IT and Web Based Solutions

4.1 *Assess newly designed web site in terms of recent design and staff maintenance capabilities; review AMIR's experience in funding 35-40 other web sites.*

4.2 *Links - JTB to MOTA; to the Jordan Investment Board and the Kings Economic Consultative Council; to ASEZA; to Royal Jordanian Airlines; to Jordan Hotels Association and Ammon College; to Jordan Restaurant Association, to Jordan Travel and Tourism Operators, to Health Care Providers (existing or future Associations); to Universities*

4.3 *Web site should be labeled Welcome to the Jordan Tourism Board, Jordan's Official Site for Tourism*

4.4 *Differentiate from MOTA's web site (remove video and attractions from MOTA and feature under JTB)*

- 4.5 *Multi-lingual* - JTB said languages will be Arabic, English, Spanish, German, French, and Italian (Japanese would be an asset)
- 4.6 *Maintenance* - Update site daily (data base driven more user friendly)
highlight weekly releases on special events, conferences, and domestic tourism specials
- 4.7 *Home Page* - should include links to all types of travel being marketed with specific info on sites and surrounding communities including nature/adventure/eco, heritage including walking tour of Amman, educational (link to universities and other educational programs), health/wellness/medical (link to hospitals/doctors association), family (kids stuff), investor
 - 4.7.1 Home Page should also include an Event Calendar, GREAT DEALS, Map of the country, FAQs, Contact Us
 - 4.7.2 Home Page should include an "In Jordan" section with links to Events, Accommodations (hotels, lodges, camping, wedding, and corporate), Attractions/Art/Music, Dining (Arab, American, Asian, Coffee Shops, European, Fast Food, Italian, Japanese, Mexican, Pizza, Sweets), Recreation, Shopping (Antiques, Apparel, Galleries, Gifts, Handicrafts, Jewelry/Gold Souks) and Transportation (airlines, buses, ferry to Egypt, taxis, service to Damascus) *(Note that when I opened the Royal Jordanian web site, it said it was temporarily unavailable. When I opened the Emirates Airline web site, there was a lot of information AND the home page included a photo of Petra!)*
 - 4.7.3 link to Conventions and Exhibitions page (trade fairs, workshops)
 - 4.7.4 links to Industry Contacts , to Media, to Government
 - 4.7.5 link to Statistics Updates

Start Date: June
Completion Date: August
Technical Advisor: Katy Brown, Visionary Consultants, CO
(Ms. Brown created the CO State Tourism web site, the most successful state web site in the U.S.)
LOE: to be determined with the TA

5.0 Recommended Institutional Networking and Linkages (advocate meeting participation) to Increase Cooperation Amongst Sectors

- 5.1 Link JTB to the Jordan Investment Board (Eng. Rania Soubar) to create one-stop-shop for tourism developers in feasibility phase.
- 5.2 Link JTB to ASEZA to jointly market tourism (investigate Nicaragua's construction boom under Enrique Bolanos – facilitated through new Incentive Law for the Tourism Industry - how does it differ from ASEZA).
- 5.3 Link JTB to Medical Industry and assume responsibility for marketing Medical and Health/Wellness Tourism.
- 5.4 Link JTB to Universities (particularly Jordan, Yarmouk, Hashemite and Ammon College) and assist in promoting Educational Tourism.

- 5.5 Link JTB to the reinvigoration of the Vision 2020 planning – key sectors are medicine, education, and tourism; develop grass-roots network of supporters in governates, implement national public awareness campaign (AMIR is working with Ms. Youssef and CIPE)
- 5.6 Link JTB to the Municipality of Amman, in order for JTB to assist Amman with graphics and to better promote Heritage Tourism and cultural events in Amman (e.g., on April 18, 2002, Amman becomes the Arab Cultural Capital through a UNESCO program, and JTB is not involved in the higher committee or publicity, thus, the municipality's graphics do not reflect a positive image)
- 5.7 Link JTB to rural communities and outlying jurisdictions to share information on local tourism activities.
- 5.8 Link JTB to adventure/eco tourism through RSCN and JREDS.

6.0 Micro-enterprise/Community Based Training

6.1 *Handicrafts* – Support the AMIR 2.0 Micro-enterprise Initiative. Bring in international artists to assess industry. Review successful modes/community action plans in Oaxaca, Mexico and Monteverde, Costa Rica.

- 6.1.1 Create 2 pilot projects, one in the north (Jerash or Umm Qays) and one in the south at Umm Sayoun to train local women. Assist with new designs for market based handicraft production, to increase women's decision-making power and control of resources.

Start Date:	September
Completion Date:	December
Local Advisor:	Rebecca Salti (formerly with RSCN)
Technical Advisor:	Aid to Artisans and Vicky Hansen, Professor, USC, Ceramics
LOE:	Pilot Projects - Training Workshops

6.2 *Agro-tourism/Traditional Foods* – Analyze opportunities in small/rural communities for food based micro enterprises, such as olive oil, cheese, bread, fruit juice bars production. Review successful women's cooperatives in Prespalakes, Greece and El Crelo, Mexico.

6.3 *Local Hotels/B&B Start-ups* – Train owners/managers in operations and marketing techniques (particularly a problem in small communities with important sites like Wadi Mousa, Jerash, Madaba, etc.). As individual and adventure tourists increase in Jordan, this will become an increasingly important area of infrastructure – it should be clean, provide expected minimal services, charming albeit perhaps rustic, and well priced to meet market demand.

7.0 Tourism Sub-sector – Adventure/Nature/Eco Tourism

7.1 *Ecotourism Planning, Promotion, and Management Workshops* – JTB, RSCN/Gerry Mitchell, JREDS (Diving Society), the universities, and the tour operators, such as Discovery, to target adventure travelers around the world

and better meet market demand. (GeoExpeditions is familiar with Jordan, and they offer a 5 day tour.)

The Ecotourism Society can present successful case studies in Kenya, Belize, and Ecuador. TA should analyze and present other successful applicable programs, such as climbing in Kenya (Mt. Kenya), bird conservation in Nicaragua, and botanical programs in Monteverde, Costa Rica, and marine and community ecotourism.

(Note: Marketing section 3.12 includes TA for operators' self-marketing)

Start Date:	June
Completion Date:	August
Technical Advisor:	Jim Sano, President, GeoExpeditions (creators of the best adventure travel marketing campaign in the US)
Technical Advisor:	Elizabeth Halpenny or Gail Lasch The Ecotourism Society
Technical Advisor:	Dr. Richard Murphy, Director of Educational Science, Ocean Futures Society (marine ecotourism specialist)
Technical Advisor:	Dr. Amanda Stronza, Lecturer, Anthropological Sciences, Stanford University (community ecotourism specialist)
Technical Advisor:	Oliver Hillel, Tourism Program Coordinator, UNEP
LOE:	Training Workshops

7.2 *Promotional Marketing of Ecotourism* - Link JTB to RSCN and the Royal Diving Society/JREDS and assist with promotional campaigns, e.g., Wadi Finan, authentic tented camps, promotional waterfront walking tour in Aqaba, etc. JTB has offered RSCN space in future trade fairs – AMIR could provide assistance for that exhibit.

8.0 Tourism Subsector – Religious (Islamic and Christian))

8.1 Islamic Tourism

8.1.2 Petra Moon Tourism Services offers Holy Land Tours in Jordan, and the itineraries, which are on the web, are quite sophisticated, including “The Golden Age of Islam,” and “Islamic Art and Architecture.” Assess those itineraries with them and analyze other opportunities for Hajj, Umra, and general visitation to Shi’ite (Iranians pilgrimage) and Suni sites (Turkey and Iraq). Also assess increased length of stay by diversifying product, e.g., Islam with family vacations such as Arabian nights in Rum and Dana

8.1.3 Work with Petra Moon to improve their web site and establish links to Islamic sites such as “IslamiCity in Cyberspace/Travel Center” (1/2 mm hits), Al Hajj and Umrah Info Portal, Muslim Travel Study Programs,

Muslim International Vacations, etc. and brochure, to create “storytelling,” and to analyze JTB’s Islamic brochure.

8.1.4 Translate JTB’s Islamic brochure or a revised version into Arabic, differentiating Suni and Shi’ite sites, and assist Petra Moon in marketing to the Gulf, Levant, and outlying Islamic countries.

8.1.5 Hold a workshop and present products/itineraries to the JSTTA. Work with the tour operators to create a data base of buyers and storytelling and itineraries targeting Sunni Moslems, such as the following 3 day “*Journey with the Prophets*”:

- * Amman – visit the Ottoman-style Al-Husseini Mosque which is rebuilt on the remains of a mosque built in 640 AD by the second Caliph Umar bin al-Khattab;
- * Cave of the Seven Sleepers or Kahf Al-Raqim, mentioned in the Holy Koran;
- * Mt. Nebo, alleged to be the final resting place of Prophet Musa.
- * Continue the second day to the Jordan Valley/Bethany where Prophet Yahya baptized Prophet Issa;
- * Prophet Lut’s Cave;
- * Tomb and Islamic Complex including a mosque, library, and cultural center of the venerable companion, Abu Ubeidah;
- * site of the Battle of Muthah (629 AD), which took the lives of Prophet Mohammed’s closest companions.
- * Visit their tombs in the town of Al-Mazar al-Janubi near Kerak and visit the shrine of Prophet Mohammed’s great, great grandson, Zaid bin Ali bin Al-Hussein in Kerak.
- * Petra for an overnight stay. Visit the World Heritage site, including a camel ride to the tomb of Prophet Harun, brother of Musa and return to Amman.

Start Date: September
Completion Date: December
Technical Advisor: Dar El-Salam Travel Specialists, NYC
Translator: Darroun Mukhaimer, Amman
LOE: 45 days

8.2 *Christian Tourism* –

8.2.1 Rose City Travel and Tours offers Holy Land Tours in Jordan on the web, and the Christian itineraries are quite sophisticated. Assess those itineraries with them and analyze other opportunities for extended and diversified tours. (Potential Christian sites include Jordan River/Wadi Kharrar, Makawir/John the Baptist, Umm Ar-Rassas/mosaics and tower of Stilite monk, similar to St. Simeon in Syria, Mt. Nebo/Moses, Petra/Aaron, Madaba/Byzantine churches, map and mosaics, Umm Al-

Jimal and Archangels Michael, Gabriel and Raphael, Lot's Cave, stop in Dana to see God's living creatures, Petra/Aaron's tomb, Aqaba/oldest church in world.

8.2.2 Work with Rose City to improve their web site and establish promotional links to Christian web sites and North American and European organizations, including a data base of contacts for all JSTTA members..

8.2.3 Review JTB's Christian marketing information and make recommendations for improvements.

8.2.4 Hold a workshop and present products/itineraries and marketing information to tour operators/JSTTA.

Start Date: September
Completion Date: December
Technical Advisor: Colorado Springs Religious Tourism Operator
(perhaps Butch Maltby, Christian Marketing Expert, Touchpoint Solutions, although he is currently marketing "Jewish" tours)
Samuel Abu-Jaber (local)
LOE: 45 days

9.0 Tourism Subsector – Educational *(For purposes of the AMIR project, educational tourism takes on a different meaning from the normal "intellectual or educational tourism," i.e., to provide educational opportunities for a tourist. We are extending this definition for purposes of Jordanian national economic development to include not only traditional types of educational tourism but also university programs that target increased foreign revenue through education.)*

9.1 *Assess Educational Tourism in Jordan* – analyze opportunities at the universities of Yarmouk, Jordan, and Hashemite in terms of:

- 9.1.1 National strategy,
- 9.1.2 program,
- 9.1.3 infrastructure
- 9.1.4 target market,
- 9.1.5 promotion and marketing (web and brochures),
- 9.1.6 broad economic return.

Start Date: June
Completion Date: August
Technical Advisor: Josette Wells and Duane Coughlan
University of Canberra, Australia
LOE: 30 days

9.2 *Programs* –

- 9.2.1 Elaborate on existing programs/courses, to include a travel portion/field study and family tourism within the framework of each international student's program.
- 9.2.2 Link all three universities and the Department of Antiquities to volunteer, educational archaeological trips. Assist with marketing and linkages to North American and European non-profit organizations and universities. Analyze concept of "Explorers Camp" in Jordan through US group like Crow Canyon Archaeological Center with ACOR.
- 9.2.3 Assist the University of Jordan to build on UJ's relationship with the College of William and Mary in Williamsburg, VA, to create an MBA program with a Tourism emphasis/internships in the hospitality industry at Colonial Williamsburg. This could be marketed to the Gulf and the Levant, where heritage tourism is becoming a big issue.
- 9.2.4 Assist The Hashemite University, under their recently created Queen Rania's Institute of Sustainable Tourism and Cultural Heritage Management, to create an international graduate student program at Petra during the low season of July and August, to improve the non-peak revenues to Wadi Mousa and Umm Sayoun. This could be marketed to the West as well as to the Gulf, to establish technical skills in excavation, conservation/stabilization, cultural heritage management, ethics, collection management, and GIS.
- 9.2.5 Assist Yarmouk University to create an Executive Training Workshop for tour operators through the Middle East, e.g., working through their relationship with the University of Virginia's Arabic language program in conjunction with the Darden School of Business.

Start Date: June
Completion Date: August
Technical Advisors: Dr. Ghazi Bisheh, Archaeologist
(former Director of Antiquities)
Alison McQuitty, former Director of
The British Institute at Amman for
Archaeology and History
Samer Mouasher, General Manager,
Discovery Tours (MBA U Chicago) or
Munir Nassar, International Traders
LOE: 30 days

9.3 *Infrastructure* – Work with MOTA, JTB and the universities to quickly produce tourism related products at low cost that increase the tourism experience for international students and visitors.

9.3.1 Site Interpretation and Archaeological Sheltering

Work with Yarmouk University/Dr. Zeidan Kafafi to create a way finding interpretive signage program, focused on a select number of archaeological sites, such as the Citadel and Jerash. Also analyze ACOR's archaeological shelters, as good examples of different types of international solutions. Bring international students into the program.

Start Date: September
Completion Date: December
Technical Advisors: Dr. Patricia Bikai, ACOR
Dr. Pierre Bikai, ACOR
Ammar Khammash, Architect
LOE: Discuss with ACOR

9.3.2 Interpretive Brochure and Exhibition Labels

Work with Jordan University to improve its tourism infrastructure by creating a brochure in English and Arabic for the University of Jordan's two on-campus museums: the Folklore Museum and the Archaeological Museum. As the numbers of international students and their families increase, this facility will become increasingly important. Create interpretive exhibit markers in English and Arabic.

Start Date: September
Completion Date: December
Technical Advisors: Sandra Chesrown, CMI
Wael Al Masri, DAO
Andrea Atella, Graphic Designer
LOE: 45 days

9.3.3 Walking Tour of Historical Amman

(Downtown plus 1st and 2nd Circle including King Hussein's childhood home, Mango House, Jordan River, RSCN Nature Center) Work with the cultural heritage program of The Hashemite University, Dr. Talal Akasheh, RSCN and JTB to create a brochure with a map for a walking tour of historical Amman. Seek funding from international hotels, such as The Intercontinental, whose guests are most likely to participate.

Start Date: September
Completion Date: December
Technical Advisors: Sandra Chesrown with DAO
Andrea Atella, Graphic Designer
LOE: 45 days

9.3.4 Feasibility Study – Work with the President/staff at Yarmouk University on a feasibility study to analyze a Museum/Fine Arts Complex

at Yarmouk University, including a Numismatics Museum, a Museum of Natural History, an interactive Museum of Science and Technology, and a Fine Arts Gallery and Theatre, with associated hotel suites residential housing. This facility could serve as a major national attraction for Northern Jordan, diversifying the tourism base and creating opportunities for community tourism service enterprises.

Start Date: September
Completion Date: December
Technical Advisors: Sandra Chesrown, AICP
Joe Greene, Harvard University Museum
Jafar Tukan, Architect
Khaled Murad, CC Engineer
LOE: 60 days

9.4 *Target Markets* – Analyze the Gulf and surrounding region in terms of general 4 year or longer programs; analyze the broader Islamic community and European and North American markets for specialty Arabic language and Islamic culture/politics programs; analyze the separate target market of more traditional “educational” tourism including organizations such as Youth for International Understanding, Elder Hostel and US State Archaeological Societies and organizations like Earthwatch (Jordan’s Ancient Sites Excavation School), which can fill non-peak periods such as summer school, and short-term incentive travel (example, educating international marketing teams to learn how to “mirror” nature and culture at Wadi Rum). Also explore field based education such as wildlife management internships with RSCN, coastal studies in Aqaba, or a Semester at Sea program in coordination with ASEZA.

9.5 *Promotion and Marketing* – Target above markets through both print media, web sites, and road shows. Target the European/North American/Asian markets through a network of universities, particularly those with Arab language programs or Middle East majors. Target organizations through direct written and web site advertising campaigns.

9.5.1 Road Shows – Assist all three universities, in collaboration with JTB in creating a sort of trade show to market programs and recruit students in the Gulf (Saudi, UAE, Kuwait, Oman, Bahrain, Qatar) and in the region (Lebanon, Palestine, Syria, Iraq, Egypt, Libya, Yemen).

9.5.2 Print Media/North America, Europe, Asia – Assist all three universities, in collaboration with JTB, to produce full color posters targeting North American, European, Australian/NZ/Asian undergraduates to spend a semester or more abroad under “The Jordan Experience,” offering Arabic language training (for speakers of other languages), cultural heritage, historic, political, etc. coursework. Work with the Council on International Educational Exchanges to understand

the target market. The University of Jordan has signed an agreement with a consortium of American universities, and they should be specifically targeted.

9.5.3 Print Media/Study of Arabic Muslim Countries – Assist all three universities, in collaboration with JTB, to target other Muslim countries, such as Malaysia and Indonesia, to study Arabic and culture in Jordan. Include Islamic Holy Land tours as part of the package; provide Islamic sites brochure from JTB.

9.5.4 University of Jordan/MA in American Studies – Assist in creating an international faculty exchange program focused on tourism in America.

9.5.5 Web Sites – Assist all three universities with improving their web sites to better target markets. Create a tourism info network to include groups like American Association of Overseas Students, American Culture Exchange, ASPECT for International Language Schools, Center for Cross Cultural Study, Cooperative Center for Study Abroad, Council on International Education Exchange, Educational Travel (university web sites across Europe and North America as well as Asia), Expeditions in Learning, Youth for Understanding, etc.

9.4.6 Traditional Educational Tourism Programs – Assist universities in Marketing European and North American programs such as Elder Hostel, Earthwatch, archaeological organizations, museums, universities, who can reside at the university during the non-peak summer period (at the UJ taking rooms in the newly built dorms).

9.4 – 9.5

Start Date: September

Completion Date: December

Technical Advisors: Tom Lloyd with James MacGregor or Michael Fox and the Leo Burnett Firm

LOE: Discuss with Tom Lloyd

10.0 Tourism Sub-sector Medical (Health/Wellness)

10.1 Needs Assessment – Analyze the existing industry.

10.2 Strategic Plan - Establish a representational group of medical care providers, government officials, university medical school representatives, tourism players (operators, hotels, etc.), and facilitate a methodology for going forward through the creation of a strategic plan. Include standardization (Ministry of Health and its Medical Promotion Board) and promotion of medical tourism in Jordan. Hold a number of workshops to discuss the following topics and arrive at a guiding document.

10.3 Medical Care for Adventure Travelers and Other Tourists – Work with JTB and MOTA site managers to create a system whereby tourists who are injured on sites are properly cared for; market this care to local and international ecotourism operators to give them a sense of well-being.

10.4 Medical Research/Volunteer Care Holidays – Link JTB and the health care industry to international venues to draw foreign doctors and health care professionals interested in research and volunteer work in Jordan (example, Doctors without Borders). This might be marketed in regard to Palestinian refugee camps or other needy areas.

10.5 Medical Students and Internships – Link JTB and the health care industry to international medical schools where students are interested in opportunities to study abroad.

10.6 Health/Wellness and Spa Tourism – Link JTB, the Hotel Association, and the products industry to specialized international tour operators who organize spa tours and work with the Dead Sea and Ma'in Springs Hotels to target those markets appropriately. Also link to ASEZA and potential international investors in not only spa tourism but also dietary resorts for losing weight.

10.7 Conference Tourism – Work with JTB, the Ministry of Health, and the providers associations to identify opportunities and target market international health care organizations and universities interested in the broader tourism experience of Jordan.

10.8 Standardize Care - Work with the Ministry of Health to create standardized care. Assist them in publishing a Directory of providers (similar to our PPO directories with hospitals, clinics, and doctor's qualifications and rates/costs of operations). In addition, work with JTB and the health care associations on a booklet in Arabic and English, entitled "Visiting Jordan for Medical Treatment," to include information on visas, flights, hotels, family activities, etc.

10.9 Web Site - Support the industry by creating a web site illustrating standardized care, differentiation of product (doctors and hospitals), rates, etc.

10.10 Marketing and Promotion – Support the creation of a comprehensive marketing campaign and road show to the Gulf and the surrounding Levant and North Africa region to target those markets.

An example of an immediate opportunity is to fund either keynote speakers (could be international) or an aggressive marketing campaign for the Amman World Trade Center, JTB, Ministry of Health, and ASEZA in coordination with 5 major hospitals including Al Khaldi, Jordan Hospital, and the Arab Heart Center (not the Hospital Association) for a conference in Abu Dhabi. If it is successful, they

would like to create a road show and take it throughout the Gulf, ending in Amman with a conference.

11.0 Domestic/Regional Family Tourism

11.1 - MOTA - JTB should take over responsibilities for domestic tourism from MOTA.

11.2 Institutional Strengthening – Note section on JTB improving its departments to facilitate greater domestic and regional tourism.

11.3 Linkages - Link to holiday packages with member hotels or other organizations. Link to community events. Link to charters. Link to RJ. Link to regional carriers to bring in tourists from Aswan, Luxor, Hurghada, Sharm El Sheikh, Alexandria, Rhodes, Larnaca, Antalia, etc. Link to ASEZA for off-season winter tourism, including health/wellness Dead Sea.

11.4 Promote – Create section on web site to domestically promote tourism; maintain on a daily basis to constantly encourage weekend trips. Use Events Department staff to create special opportunities for both regional and domestic tourism (Mother's Day, special religious holidays, etc.)

11.5 Hotel Association – Work with hotels to create family oriented programs.

12.0 ASEZA (ASEZA already has a Tourism Consultant, Manuel Knight, and the following should be coordinated with or through him.)

The Aqaba Special Economic Zone (ASEZA) fits within many different types of tourism (domestic, family, business, ecotourism, with links to medical and educational programs). As Jordan's only beach tourism with a number of historical and archaeological sites, Aqaba is an important engine for development of tourism infrastructure and growth in numbers of tourists.

Duty free and special economic zones are popping up around the world, as a way for governments to create employment in the private sector by attracting new investment. Jordan is competing with many countries around the world and some regionally, such as Dubai, Egypt, Morocco, Israel, and Sudan. As Jordan grows its high tech educational system, it can promote not only manufacturing but also technology for foreign markets.

In addition to the aforementioned joint marketing between JTB and ASEZA, AMIR has the opportunity to work with JTB and ASEZA to do the following:

12.1 Needs Assessment of Potential Markets (if this wasn't already completed for ASEZA under other contracts)

12.2 Study of Methods to Attract Foreign Investors

12.3 *One Stop Feasibility for Real Estate Developers* – a combined effort among ASEZA, JTB and the Jordan Investment Board to create not only the one-stop shop that has already been organized but also to create a booklet which guides a real estate developer through feasibility in Jordan (land acquisition, zoning and land use regulations, approvals process, and then the benefits of being in the ASEZ)

12.4 *Small-scale Tourism Projects* – such as the previously mentioned JREDS project in ecotourism to promote Aqaba as a diverse, authentic community in which foreign investors and manufacturers would want to invest, as a primary tourism destination, competing with other premiere waterfront tourist destinations such as Malaysia, Jamaica, and Mauritius.

12.5 *Larger scale tourism projects* - ASEZA is working to develop entertainment venues in Aqaba that would be attractive to investors and international companies (IMAX theatre, golf, casino, perhaps a Legoland type theme park, duty free shopping). With careful environmental preservation and cultural sensitivity, these efforts at improving Aqaba's day and nightlife should be supported.

13.0 Miscellaneous Smaller Sub-sectors

13.1 New Economy/Business Tourism

Link JTB member tour operators to international donors and their consultants, ASEZA and to the Hotel Association in Amman to create 1-2 day trips for the already captive market of business people/investors. "One Day to Get Away" (Malaysia: How to turn a routine business trip into a dream vacation.)

JTB should encourage hotel members to place "Jordan Today" in every room on a continuous basis, as it offers a monthly calendar of events and information on restaurants, handicrafts, etc. JTB also publishes a quarterly "Calendar Jordan," and these two efforts should be coordinated. Neither was available in my room at either the Intercontinental or the Movenpick. Also link JTB to the King's Economic Consultative Council re IT traffic.

13.2 Organizational/Volunteer Tourism

Link JTB to groups like Global Volunteers, a non-profit US NGO founded in 1984 to establish a foundation for peace through mutual understanding. GV runs 1, 2 and 3 week volunteer work experience programs in Asia, Africa, the Americas, the Caribbean, Europe, and the Pacific, and they are searching for a site in the Middle East. GV partners with ElderHostel.

GV might be able to do a "knowledge pipeline" project, i.e., computer training, computer recycling, and book donations through local schools.

GV could also work with JREDS on environmental education and grant writing/proposal research. They could also work with JREDS to establish a Dead Sea conservation project, which would be quite attractive to participants.

Start Date: August
Completion Date: September
Technical Advisor: Bud Philbrook, CEO/President/Global Volunteers
Sandra Chesrown (Former GV Volunteer)
LOE: FAM Tour; TA for report on targeting and marketing organizational tourism, 21 days.

13.3 Heritage tourism – Heritage travelers spend more and stay longer. It is a booming market in the west. In the US, 28 states now have full-time programs, whereas there were none 5 years ago. Economic return is generally community based. All through the Gulf and Arab region, including Oman, Qatar, Kuwait, and Saudi, heritage projects are beginning.

13.3.1 Work with JTB to diversify product by establishing better linkages to festivals (Jerash), galleries (Darat Al Fanoun and the Jordan National Gallery of Fine Arts which organizes the Arab Mediterranean Film Festival, calligraphy exhibitions, contemporary art from around the Arab world, and exhibitions from the West and has its calendar 6 months in advance), museums, handicraft centers (Souk Zara holds art exhibits), and cultural centers to provide web site with listing of current events (what's happening NOW).

13.3.2 Do a Cultural Affiliation Study with the various Jordanian tribes to identify heritage and sustainable community tourism opportunities, including in situ outdoor museums and oral histories.

13.3.3 Work with the Domestic Tourism Department at JTB to Create a Cultural Resource Database.

13.3.4 Create a "heritage road" tourism brochure.

13.3.5 Tie into UNESCO's international audiovisual database for cultural heritage. Create an international donor database on best heritage practices in tourism.

13.3.6 Work with JTB and MOTA to do a needs assessment of the Baptismal site in terms of staff training, storyline, specialty guide training, etc.

Start Date: September
Completion Date: November
Technical Advisor: Cheryl Hargrove, Director Heritage Tourism
National Trust for Historic Preservation
Or Heritage Tourism, Lansing, Michigan
LOE: to be determined

14.0 Financial Sustainability

14.1 Fundraising for Grants – Under the aegis of the USAID Global Development Alliance, work with JTB/tourism associations/non-profits to understand the grants making process and international grantors, i.e., bring in trainers to hold 3 day workshops with JTB and associations. Create a data base of potential funders/international corporate foundations and others, such as American Express which is funding improvements at Petra.

Start Date: September
Completion Date: October
Technical Advisor: Susan Saksa, Colorado Springs Nonprofit Center
or American Express Foundation Staff
LOE: Training Workshops Around Jordan

14.2 Stabilize JTB's Budget – JTB was promised 8 mm JD but actually received 4 mm JD from the Government and 800,000 JD from the private sector, which negatively impacts advance planning (600,000 JD are spent annually on CDs and brochures). JTB advocates a policy change to the government, i.e., the Central Bank would provide 1.5% of all tourism receipts as a grant, not a line item to eliminate negative impact on promotional quality.

(Note: Total tourism receipts in 2001 were 550 million JD, so JTB would have received close to the requested 8 million JD rather than 4 million from the government.)

14.3 Increase Stakeholder Financial Participation in JTB - All new sub-sectors should become paying members of JTB, including universities, hospitals, ASEZA, NGOS, environmental organizations, etc.

14.4 AMIR's Innovative Grants for Tourism – AMIR expects to award 20 grants under \$25,000 to associations to expand membership, service, advocacy, public private partnerships, such as the Ammon College to increase creativity and tie to US business school model through Marriott. Perhaps Tour Operators could propose a matching grant for investment in innovative web sites, or micro-enterprises could propose innovative programs for community tourism.

14.5 Training Ground for Educators - Using the South African Educational Tourism Initiative as a prototype (financed by the Spanish), establish a training ground for educators. Work with a group like INJAZ to establish an elementary curriculum and perhaps teacher field manuals, tying tourism to environmental awareness and heritage.

END OF VOLUME I OF THE REPORT

VOLUME II

APPENDIX I – BACKGROUND READING/BIBLIOGRAPHY

- Business Management Initiative (BMI), USAID's RFP, AMIR 2.0
- BMI Section, Chemonics International's Proposal to USAID
- BMI 2002 Work Plan
- Tourism Sector Memorandum by Patricia Bikar, Chemonics International
- Jordan Tourism Board's Marketing Plan
- Jordan Vision 2020, Jordan Business Associations' Initiative
- JTB Promotional Brochures (various sites and "Tracing Islam in Jordan", Maps, and Calendar of Events
- Jordan Investment Board Information Packet
- Sector Report on Education, Export & Finance Bank, Abeer Arafat, 2001
- Sector Report on Tourism, Export & Finance Bank, Abeer Arafat, 2001
- Guide/Hospitality/Cultural Heritage & Conservation Information from various University programs (University of Jordan, The Hashemite University, Yarmouk University)
- Tourism Marketing Strategy, Thomas G. Lloyd for Chemonics International, USAID, 1993.
- JICA Tourism Reports, 1995-1996.
- Petra National Park Management Plan, UNESCO, 1994.
- Jordan Sustainable Tourism Development Project Report, Sandra A. Chesrown for Chemonics International, USAID and MOTA, 1997.
- "Al Reem," Dana, RSCN, 1997.
- Strategic Thinking, Andy Bruce and Ken Langdon, 2000.
- "Jordan," Susan Wood and Andrea Atalla for Chemonics International, JTB, 1995.
- The Holy Sites of Jordan, Ghazi Bin Mohammed, Sr. Ed., TURAB, USAID, 1996.
- RSCN Strategic Plan for Ecotourism – report being prepared
- MOTA National Strategy (ies) for Tourism – awaiting reports from MOTA

APPENDIX II – BACKGROUND INTERVIEWS

Thank you to all of those who participated, as we recognize your time is valuable.
(Questions regarded itineraries, length of stay, JTB strengths and weaknesses, budgetary issues, policy reform, strategic planning, industry networking, national image and promotion in general, target markets (domestic, Gulf, regional, European, North American, Asia), new sectors including education, medical or health/wellness, business, religious, transportation, guides, and sites.)

Monday, February 11

Meeting with Ibrahim Osta, Component Leader, Business Management Initiative, AMIR 2.0

Monday, February 11, 3:10 – 4:45 pm

Meeting with Jon Lindborg, Director, Economic Opportunities Office, USAID

Tuesday, February 12, 8:30 – 9:30 am

Meeting with HE Dr. Walid S. Ma'ani, Minister of Higher Education and Scientific Research (former President of the University of Jordan until August, 2001, and a surgeon)

Tuesday, February 12, 10 – 11:00 am

Meeting with Mr. Bishara Sawalha, President, Jordan Society of Tourist and Travel Agents (JSTTA), Head of Tania Tours, Member of JTB

Tuesday, February 12, 1 – 2:00 pm

Meeting with HE Faleh Al-Nasser, Minister of Health

Tuesday, February 12, 3 – 4:30 pm

Meeting with Mr. Marwan Khoury, Managing Director, Jordan Tourism Board

Wednesday, February 13, 11:30 – 12:30 pm

Meeting with Mr. Fadi Sharaiha, Executive Director, Jordan Royal Ecological Diving Society (JREDS)

Wednesday, February 13, 4 – 5:00 pm

Meeting with Mr. Yassar Toukan, General Manager, World Trade Center

Thursday, February 14, 10 – 11:00 am

Meeting with Dr. Abdalla Al-Musa, President, University of Jordan and Dr. Ahmad Majdoubeh, Director, Public Relations/International Programs

Thursday, February 14, 12:30 – 1:30 pm

Meeting with Mr. Khalid Irani, Director General, Royal Society for the Conservation of Nature, and Mr. Chris Johnson, Development Director, RSCN

Thursday, February 14, 2 – 3:00 pm

Meeting with Mr. Jeryes Samawi, General Director, Jerash Festival of Culture & Arts

Thursday, February 14, 4 – 5:00 pm

Conference: RSCN and Gerry Mitchell, Tour Operator, Jordan US Business Partnership, JTB, MOTA, and Jordan's Eco/Adventure Tour Operators

Thursday, February 14, 7 – 8:00 pm

Meeting with Graduate of Ammon College, Guide, Amjad Sherman

Friday, February 15, 9:30 – 10:30 am

Site Visit, USAID funded RSCN Nature Center construction site and Jordan River and Dana Handicrafts

Saturday, February 16, 10:30 am – 11:30 am

Meeting with Mr. Christophe Laure, Resident Manager, Intercontinental Hotel

Sunday, February 17, 11 – 12:00 pm

Meeting with Mr. Michael Nazzal, Managing Director, Jordan Holiday Hotels Company (including Radisson SAS), and President, Jordan Hotel Association, and with Mr. Bassam Kawash, General Manager, Jordan Hotel Association and President of the (emerging) Jordan Restaurant Association

Sunday, February 17, 2:30 – 3:30 pm

Meeting with The Hashemite University - Prof. Anwar Battikhi, President, Dr. Talal Akasheh, VP of Development and Planning and Dean of Queen Rania's Institute for Tourism and Heritage, and Nabeel Mesmar, Director of Cultural & Public Relations Department

Sunday, February 17, 6 – 7:30 pm

Briefing with Ibrahim Osta, BMI/AMIR 2.0, Intercontinental Hotel

Monday, February 18, 8:30 – 9:30 am

Briefing with USAID/Jamal Al-Jabiri, Project Management Specialist – Private Sector, Jim Schill and Maha Mousa, USAID, and Steve Wade and Ibrahim Osta, Chemonics/AMIR 2.0

* *Power Point Presentation*

Monday, February 18, 10 – 11:30 am

Roundtable Discussion with Members of the Jordan Society of Tourist and Travel Agents Association (Present were Kawthar Ali and Ethar Al-Robie of Munir Tours, Hala Ayoubi of the Jordan Society of Tourist and Travel Agents, Emad Bisharat of Lords Travel and Tourism, Wael Haddadin, Partner, Dead Sea Beach Tours, Basim Mubarak of Amani Tours, Munir Nassar of International Traders, Nicolas Sabanegh of the Jordan Travel Bureau, Bishara Sawalha of Tania Tours and JSTTA, and Gaby Seikaly of United Travel Agency.

Tuesday, February 19, 10 – 11:00 am

Meeting with HE Taleb Refai, Minister of Tourism and Antiquities, Habeeb Habash, Assistant Secretary General at MOTA, and Mazen Hmoud, Deputy Managing Director at JTB

Tuesday, February 19, 1 – 3:30 pm

Lunch at Yarmouk University with ex-Prime Minister Refai, followed by a meeting with Dr. Fayez Khasawneh, President, Yarmouk University, Dr. Hisham Gharaibe, VP for Administrative Affairs, and Dr. Ohammad Sabarini, VP for Academic Affairs

Wednesday, February 20, 9 – 9:30 am

Meeting with Ms. Layali Nashashibi, Executive Secretary to the General Manager, Movenpick Resort, and President of the Business and Professional Women's Association of Aqaba and President Elect of the Aqaba Rotary Club.

Wednesday, February 20, 1 – 2:00 pm

Meeting with HE Akel Biltaji, Chief Commissioner, Aqaba Special Economic Zone Authority (ASEZA) and former Minister of Tourism and Jamal Al-Jabiri, USAID, Farid Salahi, USAID, and Ibrahim Osta, BMI/AMIR 2

APPENDIX III – JTB SWOT ANALYSIS

Strengths	
• Royal Family	Request more participation in promotion (such as April 2002 Travel Channel show)
• Product diversity	Promote educational, medical or health/wellness, organizational, business/IT
• Excellent climate	Inaccurately marketed; focus on mild Mediterranean sunny days/cool nights
• Friendly population	Add educated to friendly
• Rich in heritage and culture	Promote diversity more (e.g., religious)
• Geographic diversity	Will be strengthened by diverse hotel locations in north and south
• High security	Repeatedly pronounce as a safe destination
• Well paved infrastructure	Public awareness of safe driving
• Holy sites	Expand/improve Christian sites and promote tours in Arabic of Islamic sites
• Accessibility and Proximity	
• Quality accommodations/services	Hotel international network already improved – promote more about great food and include cooking in heritage tours

Opportunities	
Create awareness	Promote more
• Attract more airlift capacity	Continue to push for this as well as for charter flights
• Presence of JTB's overseas reps	Continue to push North America office for greater ad and targeted organizational promotion
• Promote convention and incentive Market (MICE)	Push for greater private foreign investment in Aqaba to better meet this need encourage entertainment such as IMAX, wastewater treated or sand golf courses, Legoland type theme park, improve beach offerings, limited casino
• Capitalize on new travel trends (culture, spa, health, soft adventure)	Target market these and others – educational, religious, business, hard adventure
• Exploit short breaks and weekend holiday potential	Increase imagination of tour operators and hotels to meet growing domestic market (in addition to Eids, e.g., Mother's Day Holiday, New Years, Valentines Day)
• E-commerce growth	E tourism growth through greatly improved web site

Weaknesses	
• Low general awareness	Improved marketing (need \$5 million plus for North America alone)
• Lack of brand identity	Improved marketing
• Minimal inclusion of Jordan within tour operators' catalogues	Improved coordination with major operators with promotion of stand alone destination more N American/Asian FAM trips
• Trade sees as extension	Promote stand-alone and extension
• No beach product	Continue to improve Aqaba w/ASEZA Movenpick great addition for international
• Lack of airline seats v. hotel rooms	
• Stop overs on available sectors	
• High visa charges	Getting visas easily without hassle is more critical than pricing
• Lack of facilities	Continuing to improve
• Insufficient promotional campaigns	Huge issue in Gulf and North America/Asia
• No internal tourism	Growing market; continue to cater to domestic tourism
• Weak organizational structure/JTB	Institutionally strengthen through new hires in marketing, communications, events planning
• Unreliable statistical information	Improve through policy reform (Public Security Bureau) and established network
• Inadequate number of bilingual guides	Strengthen Ammon College and encourage higher quality through competition
• Inadequate training facilities	Strengthen Ammon College and encourage higher quality through competition
Threats	
• Political instability in the region	Promote safe destination
• Strong regional competitors	Promote increased investment/coordinate investing in the market JTB with JIB and ASEZA
• Strength of the US\$ against Euro	Euro nearly same as dollar
• Greater product awareness in the retail trade of Israel and Egypt	Increase community based training through improved market acceptable design
• Immature private sector	Continue to improve through Jordan 2020 Promote JTB involvement in process
• Shifting local habits and commercialization/loss of culture	Preserve sites and promote authenticity
• Exploitation of nature	Preserve sites – JTB closer cooperation with RSCN

