ECONOMIC PROFILE OF MADABA

14 August 2006

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Economic Profile of Madaba

August 14, 2006

CONTENTS

ACRONYMS

FIT	Free Independent Traveler
MoTA	Ministry of Tourism and Antiquities
MSME	Medium, Small and Micro Enterprises
USAID	United States Agency for International Development
WTO	World Tourism Organization

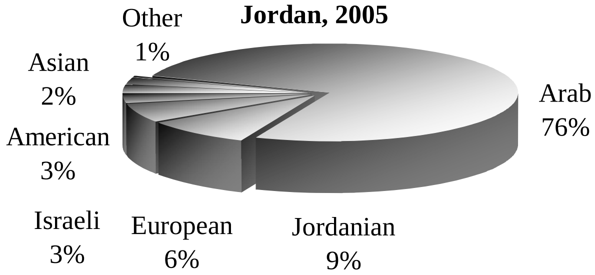
Tourism in Jordan at a Glance - (2002-2005)[1]

- The total number of visitors increased from 4.7 million in 2002 to 5.8 million in 2005, representing a growth of 24% over the entire period. *Table 1*

- Over three-quarters of arrivals were Arabs in 2005, followed by Jordanians and Europeans as illustrated in chart 1. *Table 2*

- The number of overnight visitors was almost equivalent to the number of same day visitors in 2005. This pattern has been consistent since 2002. *Table 3*

Chart 1: Breakdown of Visitors to Jordan, 2005



- The number of tourists on package tours increased from around 138 thousand in 2002 to around 340 thousand in 2005, representing a 146% growth over the entire period. Despite this growth however, the average length of stay remained somewhat the same over the same period. *Table 4.*

- The number of hotel rooms increased from around 19,400 in 2002 to around 20,800 in 2005, representing a small growth of 7%. Room occupancy on the other hand increased from 32% to 48% over the same period. *Table 5.*

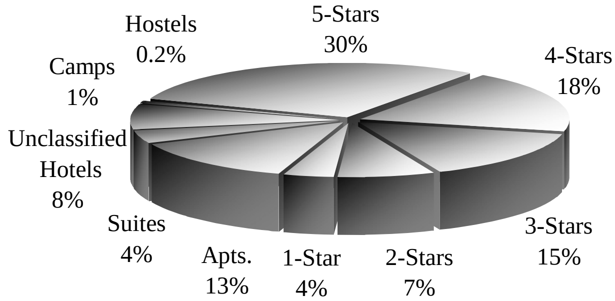
- The number of nights occupied in both classified and unclassified hotels reached 5.6 million in 2005. This translates into 3.3 million rooms occupied. Moreover, the ratio of resident to non-resident nights spent was around 1:4 in 2005. *Table 5.*

- The distribution of bed nights was predominantly concentrated in 5-, 4-, and 3-star hotels at around 63% in 2005 as illustrated in chart 2. *Table 6.*

- The majority of bed nights in 2005 was spent by Arabs (38%), followed by Europeans (26%), Jordanians (19%), and Americans (6%). *Table 7.*

- The peak in the number of bed nights continues to occur in August. This is due to the fact that Arab tourism is at its highest level during this month. *Tables 8-10.*

Chart 2: Distribution of Bed Nights by Hotel Classification, 2005



- Around 8,100 new jobs were created in the tourism sector between 2002 and 2005 reaching around 29 thousand in 2005. Around 7,400 of these new jobs were created by travel agencies. *Table 11.*

[1] Reference to tables is made in Appendix 1.

- Hotels and travel agencies are the two largest employers in the tourism sector, absorbing 78% of total employment in the tourism sector in 2005, or 44% and 34% respectively. *Table 11*.

- The disparity between the number of male and female employees in tourism is immense. In 2005, the number of male employees reached 26,715 employees, comprising 91% of the labor force in tourism. *Table 11*..

- The number of hotels in Jordan reached 468 in 2005, registering a modest growth from 461 hotels in 2002. The largest growth in tourism-related enterprises was witnessed in tourist restaurants and tourist cars. The former witnessed a 40% growth and the latter a 45% growth rate over the same period. *Table 12.*

Objective

The objective of this report, as per the SOW, is to assess and develop baseline and forecast information pertaining to the performance of the Madaba Cluster in attracting tourists and contributing to the national goal of extending tourists stay in Jordan. This information will be used in profiling the tourism economy in the Madaba Cluster and helping SIYAHA fulfill its requirements to produce a program monitoring plan.

For purposes of this report, Madaba City will be profiled in-depth, while other main attractions will be briefly covered. Madaba City is the only attraction that offers a variety of cultural, heritage, religious and commercial tourism products, and can cater to overnight visitors. Moreover, the data available is more comprehensive on Madaba, particularly those pertaining to tourist profiles. Hammamat Ma'in will not be covered at this stage.

Data Sources

The economic profile report for the Madaba cluster was developed based on the existing database at the Ministry of Tourism and Antiquities (MOTA). This data was compiled and tabulated in Appendix 1, and reference is made to the tables throughout the report.

Once the data at MOTA was screened, a matrix was constructed in order to identify the gaps in data.[2]

Moreover, surveys and fieldwork were carried out in order to fill in the gaps, such as tourist spending, and average length of stay. These surveys include:

1. Madaba Visitor Survey
2. Enterprise Survey[3]
    - Hotels / Motels Survey (Sample size 78% of all hotels/motels)
    - Restaurants / Coffee Shops Survey (Sample size 100% of all restaurants and coffee shops)
    - Souvenir Shops Survey (Sample size 100% of souvenir shops)

The current visitor survey captured mostly the opinions of package tourists, which comprised 75% of total respondents. As will be illustrated later, package tourists comprise a minor segment of tourists visiting Madaba. Therefore, it is imperative that the survey be repeated six times over the next three years, and preferably during high traffic seasons in order to capture the opinions of all tourist segments.

The tourism enterprise survey can be carried out once a year.

[2] Availability of data and data collection methodology are detailed in Appendix 2.

[3] Survey results are presented in Appendix 3

Madaba Cluster

The historic significance and cultural heritage of the Madaba Cluster draw an increasing number of international and local tourists every year. This unique cluster encompasses a number of urban, historic, religious, and natural tourism attractions that are alluring to both cultural visitors and religious pilgrims, in addition to a growing number of adventurous visitors. The Cluster's main attractions are anchored by Madaba City, and include Mount Nebo, the Baptism Site, Um Ar-Rasas, Mukawir, and Hammamat Ma'in.

The following constitute the prime assets of the Madaba Cluster:

- **A plethora of holy sites** (Baptism site, Mount Nebo, Mukawir, etc.)
- **The Sixth Century Map** at Madaba City
- **Historic buildings** / architecture in Madaba City
- **Natural beauty** of the farm lands surrounding the city of Madaba; scenic drive to Mount Nebo; panoramic view of the Dead Sea, Jordan Valley, and the highlands from Mount Nebo and Mukawir.
- **Affordability of visit** for day and overnight visitors.
- **Pleasant climate** most of the year.
- **Gateway to the Kings Highway**, Jordan's premier touring corridor.
- **Archeological Park** in Madaba city, which has a number of mosaics on display, and extends along the ancient Roman Road.
- **Museum Complex** that exhibits the mosaics in the Church of the Virgin and the Hippolytus Hall.
- **The Madaba Mosaics School** that is primarily specialized in the restoration of antique mosaics; preservation of mosaic floors throughout the country; studying and documenting mosaic floors.

Local Tourist Products in Madaba City

Tourist products primarily encompass cultural attractions, recreational activities, organized tours, festivals and events. Table 1 below provides a summary of the current tourist products and the future projections as envisioned by the "MADABA CLUSTER/GOVERNORATE TOURISM STRATEGY 2006 AND BEYOND".

Table 1: Summary of Current and Projected Tourist Products

Tourist Products	Current	Future Projections as stated in the "Madaba Cluster / Governorate Tourism Strategy 2006 & Beyond"
1- Cultural Attractions	• The 6th Century Map; • Church of the Virgin and the Apostles; • Archaeological Museum; • Mosaics School of Madaba.	
2- Recreational Activities	Limited hiking and cycling activities.	**<u>Before 6 pm:</u>** • Locally Festive Themes: it treats a certain theme and provides music, exhibits and portrayals related to the theme. • Living Workshop: a traditional activity can be reactivated within a certain working area. • Photography and Painting Competition: in a gallery or any other public building. • Flea Market: an occasional market that offers antiques, books and magazines. • Tourist oriented specialty retail: a high quality bookshop offering a wide range of literature. **<u>After 6 pm:</u>** • Story-telling program for restaurants; entertainment for visitors in restaurants using stories and myths from local history. • Nighttime walking tours with costumed guides highlighting the long history of the town. • Musical entertainment of folkloric culture. • "Summer Nights" Festival: a certain theme can be highlighted through music and portrayals from stories and myths to entertain audiences. • New Year, Ramadan, & Christmas seasonal activities; special programs of entertaining and promotion activities that can contain special festive decorations. **<u>Other Activities:</u>** • Cook-your-own dinner teaching restaurant, using well-known products from Middle Eastern cooking. • Bedouin cook-out feast in a restaurant or tent. • A best home-cooked dish contest.
3- Tours & Pedestrian Routes	Short walk from the Visitor Center to the Map at St. Georges Orthodox Church – **unorganized tour**.	Setting up a true "souk" experience, through organizing a walking tour that begins at the Visitor Center, with traffic reduced/excluded from the core pedestrian areas over the operational day. Walking tour routes will be marked out clearly through promotional materials, this will enable shops, restaurants and services along the routes to develop their business under license where they have access to public areas. An area of great potential as a pedestrian public space is the area in front of St Georges Orthodox Church. As much of this area as possible should be a piazza representing the heart of the historic quarter. The large vacant site adjoining the Church offers great potential for a town centre mixed development.
4- Festivals and Events	None	**<u>Before 6 pm:</u>** • Locally Festive Themes: it treats a certain theme and provides music, exhibits and portrayals related to the theme. • Photography and painting competition in a gallery or any other public building. **<u>After 6 pm:</u>** • "Summer Nights" Festival: a certain theme can be highlighted through music and portrayals from stories and myths to entertain audiences. • New Year, Ramadan, & Christmas seasonal activities: special programs of entertaining and promotion activities that can contain special festive decorations.

Tourism Product Assessment

This section looks briefly at the critical mass, diversity, responsiveness, complementarities of products and supporting services.

Table 2: Madaba Cluster Tourism Product Assessment

ASSESSMENT FACTOR	MADABA CLUSTER ASSESSMENT
Critical Mass	The cluster is endowed with a critical mass of tourist products.
Range	The cluster has a wide spectrum of products and attractions that cater to a variety of tourists (cultural, religious, or adventurous). **Madaba City** is located 30 kilometers south of Amman, and houses the renowned 6th Century Mosaic Map of Jerusalem and the Holy Land. The town is also known for its Byzantine and Umayyad mosaics. **Mount Nebo** overlooks the Jordan Valley and Dead Sea. It is considered one of Jordan's foremost holy sites, and the spot where Moses was buried. The **Baptism Site** on the Jordan River is the site of John the Baptist's settlement at Bethany beyond the Jordan, and where Jesus was baptized. On a 700-meter high hilltop in **Mukawir** is a Herodian fortress where John the Baptist was imprisoned and beheaded. **Hammamat Ma'in** are thermal mineral springs located south west of Madaba. **Umm Ar-Rasas** is located to the east of Madaba. It is a walled city that is mostly in ruins. The prime attraction is within the Church of St. Stephen, which houses a large and completely preserved mosaic floor that dates back to 718AD.
Responsiveness	Interaction of demand and supply is frail. The vast majority of products and businesses are unable to capture and subsequently respond effectively to the evolving requirements of market demand. Most tourists spend no more than two hours visiting the map and Mount Nebo, and spend no more than an estimated JD8-10 on entrance fees, refreshments and souvenirs[4]. Small businesses in Madaba are run by their owners who lack the ability to detect visitor expectations and have limited resources to invest in product upgrades.
Restaurants	The variety, quantity and quality of dining experiences in Madaba are basic and limited.
Accommodation	Madaba has the following accommodation options: ▪ Madaba Inn (3-star) ▪ Lylys Tourist Hotel (1-star) ▪ Mariam Hotel (2-star)* ▪ Al-Mamonia Hotel Apartments ▪ A number of hostels Accommodation facilities in Madaba City still lag far behind those offered in other tourist locations such as Amman, Dead Sea, Petra, and Aqaba.

[4] Madaba Cluster / Governorate Tourism Strategy 2006 and Beyond.

ASSESSMENT FACTOR	MADABA CLUSTER ASSESSMENT
Retail	Souvenir shops in Madaba tend to carry homogenous products. Moreover, display and marketing techniques are weak and not in line with tourist needs and expectations. Income is mainly generated from clients in Madaba and Amman, and not the tourists passing through the city.

*Upgraded to 2 stars in February 2006.

Key Challenges

The most salient challenges can be summed as follows:

- **Re-packaging the tourism assets** of the cluster to better serve the drive market tourist.
- **Developing the main tourist attractions** that build on the cluster's assets, in a manner that would extend the tourist length of stay.
- **Upgrading and improving the appearance of Madaba City** (building façades, litter, etc.)
- **Developing heritage tourism** since Madaba is known more for its religious significance.
- **Organizing walking tours** with clear signs along the way.
- **Lack of knowledge amongst business-owners about visitor expectations**. Many small businesses are run by independent owners with limited resources to reinvest in product upgrades.
- **Weak presence of supporting restaurants and accommodation** that enhance the tourist experience and length of stay.

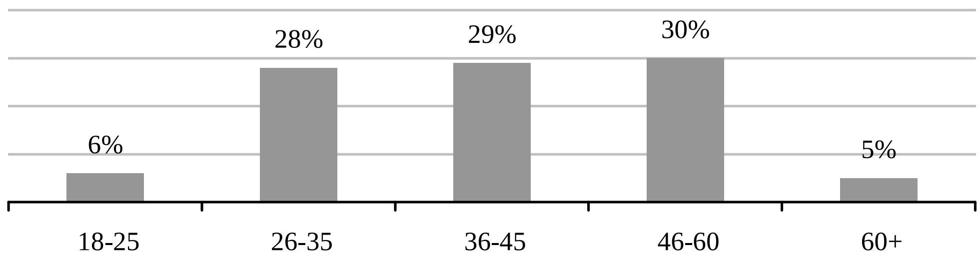
Economic Profile

Tourist Profile

Based on results generated from the visitor survey, around 65% of respondents were 4- and 5-star travelers. Another sizeable segment of 27% were 3-star travelers. This reflects a high purchasing power of tourists visiting Madaba.

The distribution of visitors by age group is almost evenly distributed across all age groups between 25 and 60 years of age as can be seen in the chart below.

Chart 3: Distribution of Visitors by Age Group

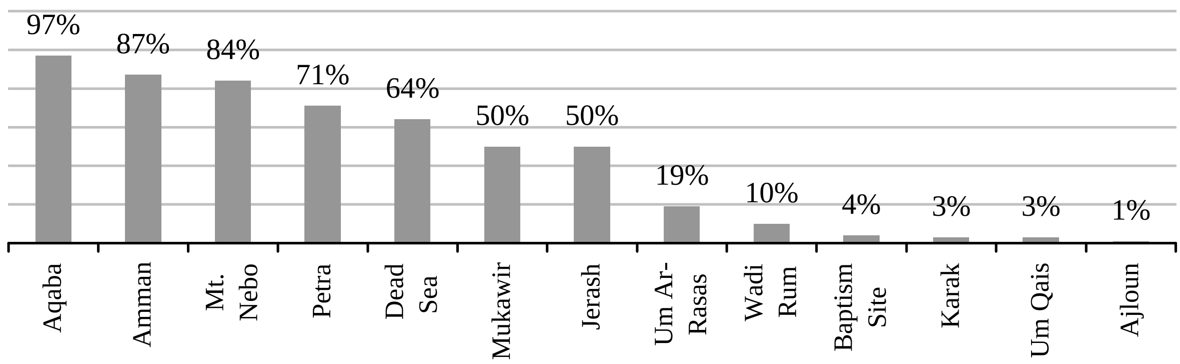


Source: Madaba Visitor Survey

Visitors to the Madaba cluster are mostly attracted to the St. George Church, and Mount Nebo. The Archeological Museum in Madaba city, the Baptism Site and Mukawir are practically unknown to tourists. Visitors assign more value to Madaba's religious association, than to its archeological significance.

The typical profile of a visitor to Madaba is someone who visits seven main sites in Jordan. These include Aqaba, Amman, Mount Nebo, Petra, Dead Sea, Mukawir and Jerash as illustrated in the chart below.

Chart 4: Visited Sites During Jordan Trip



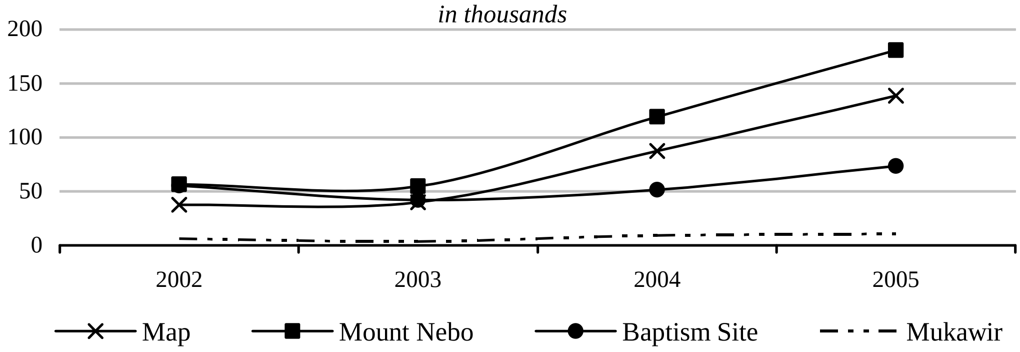
Source: Madaba Visitor Survey

Visitors to Main Attractions

In 2005, the number of visitors to Madaba City (map), Mount Nebo, Baptism Site, and Mukawir reached around 140 thousand, 180 thousand, 73 thousand, and 11 thousand respectively. No data is available for Um Ar-Rasas. *For more details refer to Appendix 1, Table13.*

As illustrated in the chart below, the numbers of visitors to the main attractions have been steadily rising since 2003 recording an average annual growth rate of around 89% for Madaba City (map), 84% for Mount Nebo, 32% for the Baptism Site, and 82% for Mukawir.

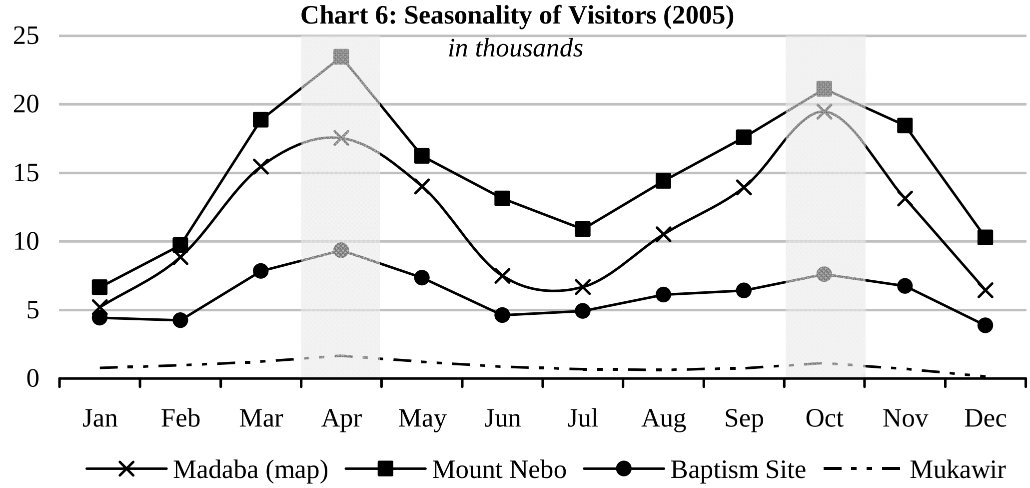
Chart 5: Number of Visitors to Main Locations (2002-2005)
in thousands



The visiting seasons of the main attractions exhibit the same pattern. As illustrated in the chart below, the peak in the number of visitors occurred twice in 2005, once in April and another in October. This pattern was also consistent in previous years. *For more details refer to Appendix 1, Tables (14-29)*

In essence, these two months represent the peak tourist seasons for visitors coming from European, Asian & Pacific, and American[5] countries. The peak tourist seasons for Arab and non-resident Jordanian visitors occurs in April and August.

Chart 6: Seasonality of Visitors (2005)
in thousands



[5] Includes US, Canadian and Latin American nationalities throughout the report.

Breakdown by Foreign and Jordanian

- The overwhelming majority of those who visited the main attractions in 2005 were European nationals as illustrated in Table 3 below. European visitors comprised around 75% of the Madaba Map visitors, 55% of the Baptism Site, 69% of Mount Nebo, and 50% of Mukawir. *For more details refer to Appendix 1, Tables (13-29).*

Table 3: Breakdown of Visitors to Main Attractions by Region, 2005

Nationality	Map		Baptism Site		Mount Nebo		Mukawir	
	Number of Visitors	% of total	Number of Visitors	% of total	Number of Visitors	% of total	Number of Visitors	% of total
American	12,401	8.9	9,359	12.7	19,259	10.7	486	4.5
European	103,937	74.9	40,731	55.4	125,107	69.2	5,381	50.3
Asian	15,149	10.9	6,054	8.2	21,516	11.9	2,090	19.5
Arab	2,534	1.8	6,679	9.1	9,023	5.0	59	0.6
Israeli	1,131	0.8	104	0.1	1,197	0.7	65	0.6
Jordanian	1,158	0.8	9,314	12.7	1,552	0.9	2,579	24.1
African	383	0.3	506	0.7	449	0.2	4	0.0
Total	**138,712**	100	**73,469**	100	**180,825**	100	**10,708**	100.0

- European nationals are mostly Spanish, French, Italian, German, and British followed by Dutch, Austrian, Swiss and Greek to a lesser extent.

- Asian nationalities are predominantly from Japan, followed by Indonesia, Malaysia, Hong Kong and Singapore.

- The Baptism Site and Mukawir were more popular attractions for Jordanians in 2005. Mount Nebo witnessed a sharp drop in the number of Jordanian visitors from around 11,000 in 2004 to around 1,500 in 2005. The Madaba Map is the least frequented attraction by Jordanians.

- In general, the number of tourists has been on the rise since 2002. Table 4 below illustrates the visiting trends of tourists to the main attractions by country / region of origin.

Table 4: Visiting Trend by Nationality (2002-2005)

Nationality	Map		Baptism Site		Mount Nebo		Mukawir	
	Trend	*Avg. Annual Growth*	*Trend*	*Avg. Annual Growth*	*Trend*	*Avg. Annual Growth*	*Trend*	*Avg. Annual Growth*
American	Number increasing annually. Fastest growth witnessed in 2004.	77.5%	Steady growth since 2003.	51%	Impressive annual growth. Number increased by 6 times from 2002 to 2005.	88%	Annual number of visitors below 500. Small growth in 2005.	77%
European	Slight drop in 2003. Major recovery in 2004. Continued to grow in 2005.	60.2%	Significant drop in 2003 and major recovery in 2004 into 2005.	68%	Significant recovery in 2004 and 2005 after drop in 2003.	68%	Significant increase in 2004. Number sustained in 2005.	73%
Asian	Steady growth.	84.2%	Steady growth.	59%	Steady growth. Number tripled between 2002-2005.	52%	Steady growth. Number doubled in 2005.	98%
Arab	Steady growth between (2002-2004). Significant drop in 2005.	25.7%	Minor drop in 2005.	11%	Steady growth after minor drop in 2003.	24%	Number dropped to 60 in 2005 from a high of 600 in 2002.	-10%
Israeli	Steady annual growth. Increased by tenfold between (2002-2005).	124.8%	Insignificant numbers. Steady growth.	37%	Significant growth in 2005 after a downward trend in previous years.	44%	Negligible numbers	
Jordanian	Steady growth until 2004. Almost no growth in 2005.	56.4%	Number of visitors in 2004 and 2005 dropped to one third of their level in 2002.	-25%	Major drop in 2005 reaching half the number attained in 2002.	29%	Steady growth since 2003.	42%
African	Steady high growth, but still low in absolute values.	98.7%	Slight drop in 2005.	30%	Steady growth over period with slight setback in 2004.	35%	Negligible numbers	
Total	Sizeable growth in 2004 and 2005.	61.3%	Numbers began to recover after drop in 2003.	14%	Impressive recovery in numbers in 2004 and 2005 after drop in 2003. Number of visitors tripled in 2005 over that in 2002.	55%	Major recovery in 2004 and resumed growth in 2005.	17%

Group vs. FIT

In 2005, the total number of package tourists at the national level was estimated at 338,787 persons. The number of package tourists to Madaba was 1,960 in 2005. Therefore, the captured package tours market was around 0.6%. This figure is extremely low compared to other sites as illustrated in the table below.

Table 5: Distribution of Package Tours by Place of Stay, 2005

Site	Package Tourists		No. of Tourist Nights	Average Length of Stay	% Share of Nights
	Number	% of Total			
Amman	284,265	83.91%	749,653	2.64	48.7%
Petra	177,553	52.41%	334,310	1.88	21.7%
Aqaba	97,645	28.82%	266,068	2.72	17.3%
Dead Sea	44,931	13.26%	117,895	2.62	7.7%
Wadi Rum	32,231	9.51%	43,221	1.34	2.8%
Karak	3,969	1.17%	5,269	1.33	0.3%
Tafeleh	2,383	0.70%	3,174	1.33	0.2%
Madaba	1,960	0.58%	2,649	1.35	0.2%
Jerash	867	0.26%	913	1.05	0.1%
Irbid	248	0.07%	369	1.49	0.0%
Ajloun	232	0.07%	390	1.68	0.0%
Ma'an Spa	107	0.03%	446	4.17	0.0%
Azraq	133	0.04%	145	1.09	0.0%
Um Qais	73	0.02%	73	1.00	0.0%
Fuhais	24	0.01%	120	5.00	0.0%
AL - Shobaq	54	0.02%	54	1.00	0.0%
Others	3,842	1.13%	13,484	3.51	0.9%
Total	**338,787**	**100%**	**1,538,233**	**4.54**	**100.0%**

Source: Ministry of Tourism and Antiquities- Travel Agents

- By subtracting the number of tourists on package tours (1,960) from the total number of visitors (180,825) we can obtain an estimate for FITs. Subsequently, **FITs are estimated at 178,865 persons** in 2005.

- The number of package tourist nights amounted to 2,649 in 2005, which translates into an average length of stay of 1.35 days as can be seen in Table 6 below. This number is less than the national average length of stay, which was estimated at 4.5 in 2005. *For details refer to Appendix 1, Tables 4 and 30.*

Table 6: Tourists, Tourist Nights, and Length of Stay for Package Tours 2005

	Madaba City	Jerash	Petra	National
Number of Tourists	1,960	867	177,553	338,787
Number of Tourist Nights	2,649	913	334,310	1,538,233
Average Length of Stay	1.35	1.05	1.88	4.5

Source: MoTA

Length of Stay: Day and Overnight Trips

Overnight Visitors

- Over the last three years, the number of bed nights witnessed a sizeable growth from around 5,000 in 2003 to over 15,000 in 2005 as can be seen in Table 7 below. This growth was propelled primarily by the increase in the number of European overnight visitors, which amounted to an average of 90% per annum.

Table 7: Arrivals and Bed Nights by Nationality in Madaba City

	2003		2004		2005	
	Arrivals	**Bed Nights**	**Arrivals**	**Bed Nights**	**Arrivals**	**Bed Nights**
American	205	471	817	3,010	713	1,742
European	2,332	2,952	5,588	7,042	7,696	10,015
Asian	47	61	95	162	168	190
Arab	178	857	279	826	499	1,385
Israeli	7	17	49	54	203	232
Jordanian	198	352	183	313	228	902
African	5	9	31	37	90	116
Other	110	224	474	562	646	742
Total	**3,082**	**4,943**	**7,516**	**12,006**	**10,243**	**15,324**

Source: MOTA

- European overnight visitors spent a total of around 10,000 bed-nights in 2005, followed by Americans and Arabs at around 1,750 and 1,400 bed nights respectively.

- The 10,243 arrivals in 2005 spent 15,324 bed-nights. This translates into an average length of stay of 1.5 nights for overnight arrivals.

- The aforementioned bed-nights in 2005 translate into room and bed occupancy rates of 29.6 and 25.5 respectively as illustrated in Table 8.

Table 8: Hotels Occupancy Rate/ Madaba City 2005

	Rooms	**Beds**
Daily Capacity	65,754	128,526
Monthly Capacity	21,835	43,305
Monthly Occupied	6,474	11,062
Occupancy Rate	**29.6**	**25.5**

Source: MOTA

Day Trip Visitors

- The number of day trip visitors is estimated by subtracting the number of hotel arrivals from the total number of visitors to Mount Nebo as can be seen in Table 9 below.

Table 9: Estimation of Day Trip Visitors to Madaba Cluster

	2002	2003	2004	2005
Total Arrivals / Mount Nebo	56,596	54,962	119,054	180,825
Hotel Arrivals / Madaba City	2,585	3,082	7,516	10,243
Day Trip Visitors	**54,011**	**51,880**	**111,538**	**170,582**
% of Total Arrivals	95.4%	94.4%	93.7%	94.3%

- The number of **day trip visitors** in 2005 is estimated at around **170 thousand persons.**

- The breakdown of day trip and overnight visitors has remained somewhat constant during the past four year. Day trip visitors continued to comprise around 94% of total arrivals.

- Length of stay for day visitors to Madaba City and Mount Nebo was estimated at 2 hours by the visitor survey, compared to 6 days in Amman, 2 days in Aqaba, 3 days in Petra, 1.5 days at the Dead Sea, and 8 hours in both Jerash and Wadi Rum.

Average Spending

Tourist spending will be estimated using data from MoTA and by surveying tourists and interviewing business owners in the tourism sector. The latter includes hotels, souvenir shops, restaurants, coffee shops, etc.

According to souvenir shop owners, FITs are more likely to purchase souvenirs, followed by Jordanian expatriates who tend to visit those shops during their summer vacations. Package tourists are the least likely to purchase any crafts, souvenirs, and others due to the fact that tour guides allocate no more than 10-15 minutes in the city[6].

Restaurants generate most of their income from Jordanians (47%), followed by pre-paid package tourist meals (41%) and finally FITs (12%). The number of FITs that have meals at restaurants is negligible relative to the other two tourist segments[7].

Overnight Visitor Spending Estimates

Accommodation

Table 10 below gives a rough estimate of bed rates in Madaba. Subsequently, and for purposes of calculating the average spending of an overnight tourist on accommodation during his/her stay in Madaba, the average bed rates per night are calculated as illustrated in column 5 below.

Table 10: Accommodation Rates in Madaba City

Hotel	Classification	Average Rate / Room (JD)		Average Rate / Room Bed [a] (JD)	Average Rate / Hotel Bed [b] (JD)	Avg. Rate / Bed by Classification [c] (JD)
		(1)	(2)	(3)	(4)	(5)
Madaba Inn	3 Stars	Single	35	35	28.8	28.8
		Double	45	22.5		
Mariam Hotel[d]	1 Star	Single	19	19	13.7	9.9
		Double	24	12		
		Triple	30	10		
Lele Hotel	1 Star	-	2-10	6	6	
Madaba Hotel	Hostel	-	4-12	8	8	11.2
Black Iris	Hostel	Single	15	15	12.5	
		Double	20	10		
Moab Land	Hostel	Single	20	20	14.2	
		Double	25	12.5		
		Triple	30	10		

Source: data in shaded cells were obtained directly from hotels/hostels.
[a] Rate in column (2) divided by the number of beds in column (1).
[b] Average of column (3).
[c] Average of column (4).
[d] became 2-stars in February 2006.

[6] Information based on Tourist Establishment Survey in Appendix 3.
[7] Ibid.

In 2005, the total number of bed-nights in Madaba City amounted to 15,324 as illustrated in Table 11 below. *Refer to Appendix 1, Table 34 for details*. Of this total, around 63% of bed nights were spent in one-star hotels, followed by 20% in unclassified hotels, 9% in three-star hotels, and finally 8% in apartments as seen in Table 11.

Table 11: Bed Nights by Hotel Classification/ Madaba City

Classification	2002		2003		2004		2005	
	Bed nights	% of total	Bed nights	% of total	Bed nights	% of total	Bed nights	% of total
Three Stars	-	0	-	0	-	0	1,354	9
One Star	3,999	65	3,134	63	7,989	67	9,708	63
Apartments	2,174	35	783	16	937	8	1,211	8
Unclassified			1,026	21	3,080	26	3,051	20
Total	**6,173**	**100**	**4,934**	**100**	**12,006**	**100**	**15,324**	**100**

Source: MOTA

In order to calculate the estimated average spending of a tourist on accommodation in Madaba, the Average Rate / Bed by Classification *(column 5 Table 10)* is multiplied by the percentage of bed nights spent in each hotel by classification in 2005. This is illustrated in Table 12 below.

Table 12: Tourist Average Spending on Accommodation

Classification	Bed Nights [a] (1)	% of Total [b] (2)	Average Rate / Bed by Classification [c] (3)	Average Tourist Spending on Accommodation (JD) (2)*(3) (4)
Three Stars	1,354	9%	28.8	2.592
One Star	9,708	63%	9.9	6.237
Apartments	1,211	8%	2.58[d]	0.207
Unclassified	3,051	20%	11.2[e]	2.24
Total	**15,324**	**100%**	-	**11.276**

[a] from table 11.
[b] from table 11.
[c] from table 10.
[d] There is one furnished apartment building. The rate was obtained directly from the owner.
[e] from table 10. Rates of unclassified hotels are assumed to be the same as those of hostels.

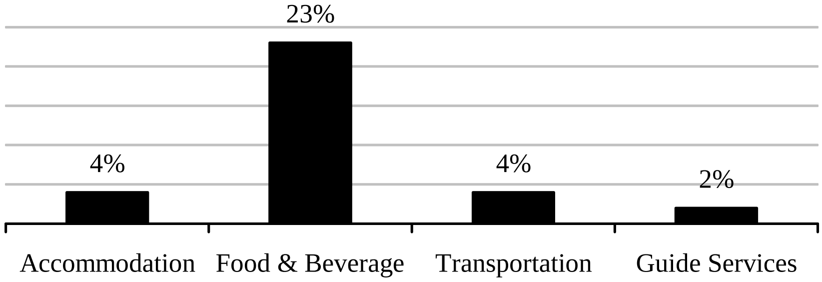
It is hence estimated that the average tourist spending on accommodation is JD11.3 per night. Moreover, since the average length of stay of an overnight tourist is estimated at 1.5 days, it can be safely assumed that this tourist **spends an average of JD16.95 on accommodation per total stay**[8].

[8] (1.5days*JD11.3 = JD15.2)

Same-Day Visitor Spending Estimates

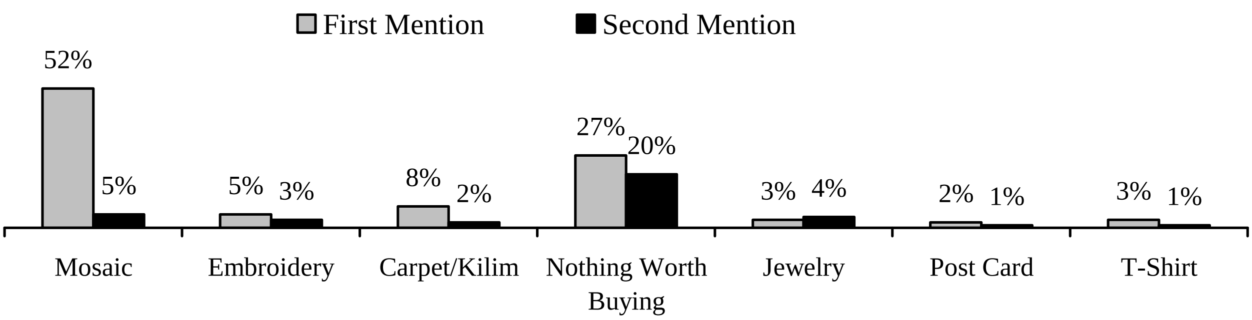
Tourists usually spend money on goods and services, such as food, transportation, retail, and entertainment. According to the visitor survey, it was revealed that very few value added services were purchased by the respondents, which were mostly on package tours, as illustrated in chart 7. The survey revealed that 4 out of 10 package tourists can be expected to buy anything during their short trip to Madaba, and only 2 out of 10 is expected to buy a souvenir. This purchasing behavior by package tourists is also confirmed by interviews with shop owners. As mentioned earlier, visitors on package tours rush in and out of the city, allowing very little time to buy souvenirs.

Chart 7:Purchases made by Package Tourists in Madaba



When asked what they would buy, if they had to buy something, 52% of respondents said mosaics as their first mention. After mosaics, the overwhelming opinion of respondents was that there was nothing worth buying in Madaba.

Chart 8: Souvenirs Package Tourists are Likely to Purchase



The visitor survey did not capture the purchasing behavior of FITs, both foreign and Jordanian. It is therefore imperative that more base point be established in order to create a more accurate baseline.

Day and overnight visitors are likely to spend the following on admission fees:

Table 13: Admission Fees to Main Sites (JD)

Tourist Site	Jordanian	Foreign	Students
Madaba Church	1	1	1
Baptism Site	1	5	0.5
Mount Nebo	0.25	1	0.15
Mukawir	0	0	0
Um Ar-Rasas	0	0	0

Source: MOTA

Tourism Enterprises

- Tourism enterprises in Madaba include:
    - Hotels, hostels, apartments, etc.
    - Restaurants and coffee shops
    - Souvenir Shops
    - Travel Agencies

- In 2005, the number of hotels in Madaba City more than doubled from 2002, reaching nine hotels, including a recently opened 3-star hotel, the Madaba Inn. The addition of Madaba Inn not only expanded the city's capacity for overnight tourists, but also elevated the quality of accommodation offered to the tourist.

- The most noticeable increase in enterprises was in the number of tourist shops, which shot up to 18 in 2005, up from 6 in the previous year as can be seen in Table 14.

Table 14: No. of Enterprises/ Madaba City

	2002	2003	2004	2005
Hotels	4	5	8	9
Tourist Restaurants	6	7	5	6
Rent a Car Offices	-	-	-	-
Tourist Shops	12	7	6	18

Source: MoTA

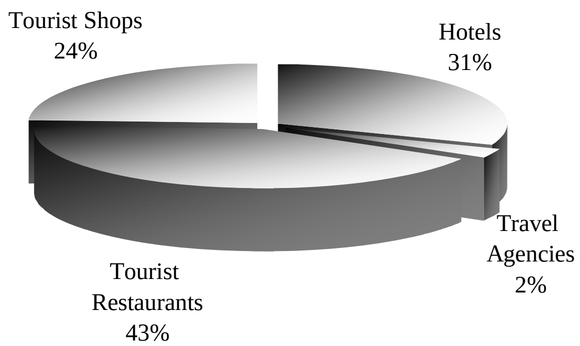
- Madaba City has no car rental offices, and travel agencies, which in a way might hinder the city's ability to become a tourist hub and/or launching base.

Employment

- Data on employment in the tourism sector is only available for Madaba City. Data on other main attractions will be gathered at a later stage.

- In 2005, a total of 210 persons worked in the tourism field, the majority of which worked in tourist restaurants. *For details refer to Appendix I Tables 32-33*. The distribution of workforce in the tourism sector in Madaba is indicated in the chart below.

Chart 9: Distribution of Employees in Tourism Enterprises, 2005



- Of the 210 employees, 25 were non-Jordanian. Foreign employees were hired mostly by restaurants (16) and hotels (9). No data by nationality is available for other businesses.

- Data on stratification by male and female is only available for hotels, travel agencies and restaurants. The total labor force in those establishments was 159 in 2005, of which 34 were females. Of those female employees, 29 were Jordanian. *For details refer to Appendix I Table 33.*

Madaba City Tourist Establishment Employment Survey

Businesses catering for tourism in Madaba City, which encompass hotels, tourist restaurants and souvenir shops, were surveyed through face-to-face individual interviews. The sample size for each establishment type is indicated in Table 16 below. The survey covered all businesses engaged in tourism, except for two hotels.

Table 15: Tourist Establishments Survey Sample, Madaba City

Establishment Type	Total Number	Number Interviewed	Sample Size
Hotels	9	7	78%
Tourist Restaurants	18	18	100%
Souvenir Shops	6	6	100%

Total employment at the surveyed businesses came out to 201 workers, 9 persons short of MoTA's statistics. This shortage of course is accounted for in the two hotels that were not surveyed.

Hotels Employment Survey Results

The seven hotels that were interviewed were established within a span of ten years as illustrated in Table 16 below. The oldest, a motel, commenced operations in 1995, and was shortly followed by two other motels, which were established in 1997 and 1999.

Table 16: Year of Establishment of Surveyed Hotels by Classification

Year of Establishment	Classification	Number of Hotels/Motel
1995	Motel	1
1997	Motel	1
1999	Motel	1
2001	1-stars, 2-stars	2
2005	3-stars	1
2006	1-star	1

The surveyed hotels had a total employment of 59 employees as illustrated in Table 17 below. Hotels in Madaba are primarily family-owned and family-run businesses, with the exception of the Madaba Inn. The latter hotel employs around 66% of the total workforce that is employed by the surveyed hotels in Madaba. The remaining hotels employ an average of around four persons each.

Table 17: Stratification of Employment at Surveyed Hotels by Type, Nationality, Gender, & Level

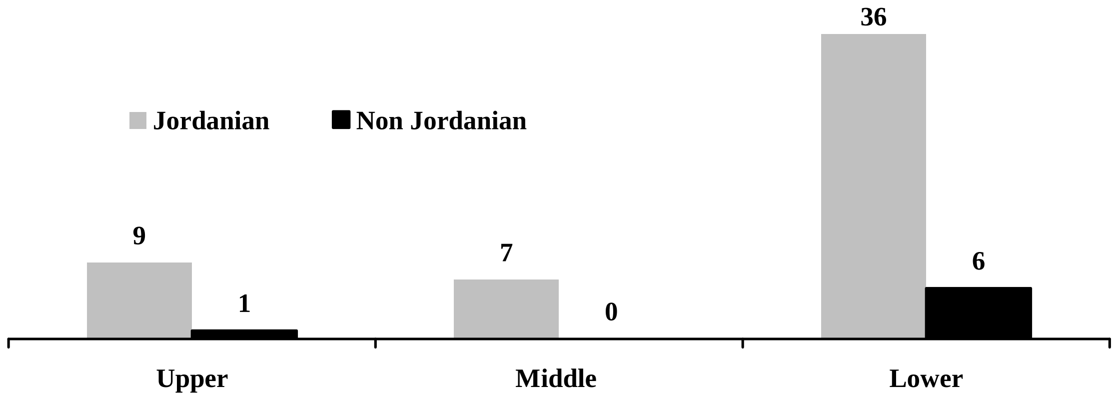
Gender and Nationality	Upper-level Management		Middle-level Management		Lower-level Employees		Total
	Full Time	*Part Time*	*Full Time*	*Part Time*	*Full Time*	*Part Time*	
Jordanians							
Male	6	-	4	-	17	1	28
Female	3	-	3	-	17	1	24
Non-Jordanians							
Male	-	-	-	-	5	-	5
Female	1	-	-	-	1	-	2
Total	**10**	**-**	**7**	**-**	**40**	**2**	**59**

Employment type is predominantly full-time (97%). Only two persons work on part-time basis. It is also worth mentioning that none of the surveyed hotels employ people on seasonal basis.

Moreover, almost 88% of those employed are Jordanians, and more than half of those employed are males. In other words, the male to female ratio, irrespective of the nationality, is almost 2:1.

The majority of employment is within the lower management level (almost 71%), followed by upper and middle, at 17% and 12% respectively as illustrated in the chart below.

Chart 10: Employment Level by Nationality



Souvenir Shops Employment Survey Results

Total employment at the surveyed souvenir shops is 66 as illustrated in Table 18 below. The two largest shops hire a total of 38 persons (the largest 25, and the other 13), while the remaining 28 persons are hired by the other 16 shops.

Table 18: Stratification of Employment at Surveyed Souvenir Shops by Type, Nationality, & Gender

GENDER AND NATIONALITY	FULL TIME	PART TIME	SEASONAL	TOTAL
Jordanians				
Male	34	6	1	41
Female	10	13	-	23
Non-Jordanians				
Male	2	-	-	2
Female	-	-	-	-
Total	**46**	**19**	**1**	**66**

Full-time employment is the most dominant type in souvenir shops, comprising 70% of total employment. This is followed by 29% and 1% for part-time and seasonal employment respectively. Moreover, 97% of employees are Jordanian (64), and 35% are females (23).

Tourist Restaurants Employment Survey Results

Similar to hotels and souvenir shops in Madaba, the majority of restaurants are categorized as small businesses, employing on average five or less persons. This however excludes two of the surveyed restaurants, which have a noticeably higher number of employees, reported at 45 and 13 within each.

Employees at restaurants are mainly full-time as illustrated in Table 19 below. Out of the 76 employees, only one male works on part-time basis. There is no seasonal employment. Moreover, out of the 76 employees, 70 are males, and 64 are Jordanian.

Table 19: Stratification of Employment at Surveyed Restaurants by Type, Nationality, & Gender

GENDER AND NATIONALITY	FULL TIME	PART TIME	SEASONAL	TOTAL
Jordanians				
Male	58	1	-	59
Female	5	-	-	5
Non-Jordanians				
Male	11	-	-	11
Female	1	-	-	1
Total	**75**	**1**	**-**	**76**

In sum,

- The survey covered 31 out of 33 establishments.
- 201 persons work for the 31 establishments.
- 76 persons work at restaurants, 66 at souvenir shops, and 59 at hotels.
- 178 persons are full-time workers.
- 146 are males, and 55 are females.
- 1 seasonal employee.
- 180 are Jordanian, and 21 are foreign (7 at hotels, 2 at souvenir shops, and 12 at restaurants).
- At hotels, 17% of employees are upper-management, 12% middle-management, and 71% lower-management.

Market Size

Market size is obtained by multiplying the number of visitors by the amount they spend. The former is obtained from MoTA's databases, and the latter will be calculated from secondary data gathered through surveys.

Future market size projections will be based on the forecasted growth rates in tourist receipts and tourist arrivals that are adopted by the Jordan National Tourism Strategy.

According to the Jordan National Tourist Strategy (2004-2010), the WTO projects that tourist arrivals to Jordan will double between the years 2000 and 2010. This translates into an increase in tourist arrivals from 1.4 million in 2000 to around 2.8 million in 2010, or an annual increase of 7.19%. Tourist receipts will increase from US$720 million to around US$1.24 billion over the same aforementioned period, representing an annual increase of 5.59%.

Forecasting the Number of Visitors

Mount Nebo received the highest number of visitors in 2005. This number also indicates the largest visitor potential in the Madaba cluster, and therefore will be used for purposes of projecting the number of visitors to the cluster as a whole.

For purposes of our projections of the number of tourists, three cases will be assumed:

1- High Case of 10%
2- Average Case of 7.19% as per the growth derived from the NTS
3- Low Case of 5%

Table 20: Projected Number of Arrivals to the Madaba Cluster

	2005	2006	2007	2008	2009	2010
High Case	180,825	198,908	218,798	240,678	264,746	291,220
Average Case	180,825	193,826	207,762	222,701	238,713	255,876
Low Case	180,825	189,866	199,360	209,328	219,794	230,784

The number of visitors to the Madaba cluster is expected to range between 230,000 to around 291,000 by the year 2010.

In 2005, the number of overnight visitors to Madaba city was estimated at 10,243 persons. Using the same projection assumptions, the number of overnight visitors is anticipated to range between 13,000 and 16,500 as illustrated in Table 21.

Table 21: Projected Number of Overnight Visitors to Madaba City

	2005	2006	2007	2008	2009	2010
High Case	10,243	11,267	12,394	13,633	14,997	16,496
Average Case	10,243	10,979	11,769	12,615	13,522	14,494
Low Case	10,243	10,755	11,293	11,858	12,450	13,073

Forecasting Tourist Spending

As derived earlier, average spending of an overnight tourist on accommodation is estimated at JD16.95 per stay. When multiplied by the total number of overnight visitors, which amounted to 10,243 persons in 2005, total spending on accommodation is therefore estimated at JD173,618.

Similarly, three growth scenarios will be assumed to forecast tourist spending on accommodation:

1- High Case of 7%
2- Average Case of 5.59% as per the growth derived from the NTS
3- Low Case of 3%

Table 22: Projected Spending per Overnight Tourist in Madaba

	2005	2006	2007	2008	2009	2010
High Case	173,618	185,771	198,775	212,690	227,578	243,508
Average Case	173,618	183,323	193,571	204,392	215,817	227,881
Low Case	173,618	178,827	184,191	189,717	195,409	201,271

Spending of overnight visitors to Madaba is expected to range between JD200,000-244,000 by the year 2010.

The visitor survey could not capture as estimation for spending on other goods and services; however, it is safe to assume that most tourists spend no more than an estimated JD8-10 on entrance fees, refreshments and souvenirs[9].

Therefore, spending on other goods and services, including admission fees by all visitors in 2005 is estimated at JD1,627,425[10]. Using the three growth scenarios, tourist spending on goods and services is forecasted to grow between JD1.89-2.28 million by 2010 as illustrated in the table below:

Table 23: Projected Spending on Goods and Services per Tourist in Madaba

	2005	2006	2007	2008	2009	2010
High Case	1,627,425	1,741,345	1,863,239	1,993,666	2,133,222	2,282,548
Average Case	1,627,425	1,718,398	1,814,457	1,915,885	2,022,983	2,136,067
Low Case	1,627,425	1,676,248	1,726,535	1,778,331	1,831,681	1,886,632

[9] Madaba Cluster / Governorate Tourism Strategy 2006 and Beyond.
[10] JD9 (average of 8-10) multiplied by the total number of visitors to Mount Nebo (180,825) in 2005.

Summary of Indicators

The following table presents a summary of indicators that could be used for future benchmarking purposes:

Number of Visitors to Main Attractions in 2005	
Mount Nebo	180,825
Madaba Map	138,712
Baptism Site	73,469
Mukawir	10,708
Forecasted Number of Visitors by 2010	230,784 - 291,220
Style of Travel*	65% (4 and 5 stars)
Breakdown of Visitors by Region	
American (US, Canada, and Latin America)	10.65%
European	69.16%
Asian	11.9%
Arab	4.99%
Jordanian	0.86%
Other	2.44%
Number of Package Tourists	1,960
% of Package Tourists to Madaba out of Total to Jordan	0.6%
Number of Package Tourist Nights	2,649
Estimated Number of FITs	178,865
Average Length of Stay for Overnight Arrivals	1.5 days
Average Length of Stay for Overnight Package Arrivals	1.35 days
Occupancy Rate (rooms)	29.6%
Estimated Number of Day Trip Visitors	170,582
Length of Stay of Day Trip Visitors[a]	2 hours
Overnight Visitor Spending on Accommodation	
Per night per person	JD11.3
Per stay per person	JD16.95
Total Visitor Spending in 2005	JD173,618
Forecasted Total Visitor Spending on Accommodation by 2010	JD201,271-243,508
Spending on Goods and Services	
Per Tourist per Visit	JD8-10
Total in 2005	JD1.63 million
Forecasted in 2010	JD1.89-2.28 million
Number of Hotels	9
Number of Restaurants	6
Number of Tourist Shops	18
Total Employment in Tourism	210
Number of Foreign Employees	25
Full-time Employment[b]:	
Hotels	97%
Restaurants	99%
Tourist Shops	70%
Employment by Management Level at Hotels[b]:	
Upper	17%
Middle	12%
Lower	71%

[a]Source: Visitor Survey, [b]Source: Tourist Establishment Survey

Next Steps

- Visitor survey to be carried out during peak seasons (April and October) over the next three years in order to develop a base line indicator. The visitor survey that was carried out provided one base point, which was data collected at one point in time in one specific location. A base point gives a snapshot at a current situation, but is far from enabling policy makers to evaluate impact of policies and projects over a period of time. "A collection of base points, draws strength from having multiple approximations and are the norm for evaluating project impact, trend and changes in satisfaction"[11].

  The current visitor survey captured the responses of package tourists, which is believed to have overlooked a sizeable segment of visitors to Madaba.

- Tourist spending on goods and services was not derived with reasonable accuracy from the visitor survey. Focus needs to be made on generating a plausible estimate during the next round of surveys.

- Establishment surveys to be carried out once a year in order to measure impact of Siyaha support programs in Madaba.

[11] Trip Report – Market Research Studies.

Appendix 1: Data Tables

Appendix 2: Cluster Data Availability / Collection Methodology

Madaba Cluster Data Availability / Data Collection Methodology

NDICATOR	DESCRIPTION OF REQUIRED INDICATOR	REFERENCE TABLE(S)[12]	AVAILABILITY (YEARS)	SOURCE	METHOD OF DATA ACQUISITION	FILLING THE GAP
Section 1: Tourists Profile						
International Tourists	An international tourist is a traveler from any country apart from the country visited.	Table 2. Number of Tourist by Nationality/Jordan	Available from 2002 to 2005. **Missing:** Um Ar-Rasas.	MoTA	Not necessary at this stage.	
Domestic Tourists	A domestic tourist is a Jordanian citizen visiting the sites.	Table 13. Number of Tourists by Nationality/Madaba Cluster. Tables (14 – 29)				
Stay-Over Visitor	The visitor is a broader category than a tourist since it includes both stay over tourists and same day visitors[13]. In this context, a stay over is a person who spends a night or more within the country visited in a private accommodation, or hotel, or hostel, or camps, or suites.	Table 34: Bed Nights/Arrivals by Hotel Classification for Madaba City Table 30 : Tourists, Touristic Nights, and Length of Stay for Package Tours/ Madaba City	Stats on the number of arrivals by hotel classification available for 2002-2005 Stay-over stats available for package tourists in Madaba, for the year 2005 only.	MoTA	-	
Day Visitor	A person who arrives and leaves the site within the same day, for the purpose of leisure, recreation, visiting family and friends, site-seeing, or for professional purposes.	-	NA	-	Difference between the number of arrivals to Mount Nebo from the total number of arrivals to hotels.	

[12] Refer to Appendix 1.
[13] http://www.tourism.govt.nz/quicklinks/ql-glossary.html

NDICATOR	DESCRIPTION OF REQUIRED INDICATOR	REFERENCE TABLE(S)[12]	AVAILABILITY (YEARS)	SOURCE	METHOD OF DATA ACQUISITION	FILLING THE GAP
Tour Groups	A Tour Group consists of travelers who bought pre-packaged travel arrangements which usually consist of several travel arrangements such as; airfare tickets, accommodation, excursion, internal transportation entertainment, recreation and admission fees.[14]	Table 30 : Tourists, Touristic Nights, and Length of Stay for Package Tours/ Madaba City	Number of stay-over package tours' tourists is available for 2005 only.	MoTA	Visitor Center Data Base	
Free Independent Travelers (FIT)	A Free Independent Traveler (FIT) is unescorted international travelers who does not buy a pre-packaged tour and usually organizes his/her own travel as they go around the country.[15]	-	Number of stay-over, and day visitors' FIT is not available.	-	Calculation	FIT tourist can be calculated by subtracting the number of package tourists from the total number of tourists visiting Mount Nebo.
Number of tourists visiting the main archeological attractions	The main archeological attractions included in the Madaba Cluster are the Madaba Map, Mount Nebo, Baptism Site, Mukawir, and Um Ar-Rasas.	Table 2. Number of Tourist by Nationality/Jordan Table 13. Number of Tourists by Nationality/Madaba Cluster. Tables (14 – 29)	Available from 2002 to 2005. **Missing:** Um Ar-Rasas.	MoTA	Not necessary at this stage.	

[14] http://www.tourism.govt.nz/quicklinks/ql-glossary.html

[15] http://www.tourism.govt.nz/quicklinks/ql-glossary.html

NDICATOR	DESCRIPTION OF REQUIRED INDICATOR	REFERENCE TABLE(S)[12]	AVAILABILITY (YEARS)	SOURCE	METHOD OF DATA ACQUISITION	FILLING THE GAP
Section 2: Tourists Average Length of Stay and Average Spending						
Average length of stay	This refers to the average time spent by tourists in a destination. This includes the average days for stay-overs, and average hours for day visitors.	Table 34: Bed Nights/Arrivals by Hotel Classification for Madaba City Table 30 : Tourists, Touristic Nights, and Length of Stay for Package Tours/ Madaba City	Stats on the number of arrivals by hotel classification available for 2002-2005 Stay-over stats available for package tourists in Madaba, for the year 2005 only.	MoTA	Tourist Survey	(1) Average length of stay can be estimated from tables 30 and 34 for overnight visitors (2) Average stay for day visitors will be collected from tourist survey
Average tourists spending/ Value of tourism receipts generated	Total expenditures by foreign tourists based on tourist arrivals and per-tourist expenditures. Estimate of average spending on the following: Lodging, food, handicrafts, others	Table 37: Admission Fees	Only admission fees are available for Jordanians and foreigners.	Madaba Visitor Center	Madaba Surveys	(1) Interviewing tourist enterprises listed under MOTA to get an approximate average tourists spending. SMEs include: × Hotels × Restaurants/Coffee Shops × Souvenir Shops 2) Tourist Survey (includes sum of entrance fees).
Section 3: Enterprises						
Number of active tourism SMEs	Active tourist SMEs in Madaba include hotels, travel agencies, tourists' restaurants, tourist's shops, and tourist transportation companies.	Table 31: No. of Enterprises/ Madaba City	-	MoTA	-	-
Employment level in active tourism SMEs	Employment type (Full time, part time, or upper v. middle versus lower level employment), can be seasonal and discrete project-based employment.	Table 33: Number of Employees in Tourism Activities / Madaba Cluster	Employment Figures are available; however the level of employment is not.	MoTA	Hotel, restaurants and souvenir shops surveys	The businesses already defined can be asked regarding the number of employees in their businesses, their gender, and to specify whether they are full time, part time, seasonal.

NDICATOR	DESCRIPTION OF REQUIRED INDICATOR	REFERENCE TABLE(S)[12]	AVAILABILITY (YEARS)	SOURCE	METHOD OF DATA ACQUISITION	FILLING THE GAP
Number of tourism MSME's operating in certain fields	Those include MSME's operating in: accommodation, restaurants, handicrafts (retailers, workshops), and other supporting tourism value chain fields, such as transportation companies.					
Number of tourism MSME's in the different Madaba's districts	Those include the micro, small and medium enterprises operating in Madaba's governorate districts.		NA			

Section 4: Employment

Stratified according to gender and tourism sub-sector	Sub-sectors include hotels, restaurants, handicrafts, other tourism support services	Table 33: Number of Employees in Tourism Activities / Madaba Cluster	Not available for tourist shops listed under MOTA.		Tourist shops survey.	The core group already specified can be asked to answer a question regarding the nationality of their employees, and their gender.

Appendix 3: Tourist Establishments Survey