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ECONOMIC PROFILE OF THE WADI RUM CLUSTER

27 August 2006

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CONTENTS

| | |
|---|-----------|
| ACRONYMS | I |
| TOURISM IN JORDAN AT A GLANCE - (2002-2005) | 2 |
| EXECUTIVE SUMMARY | 3 |
| OBJECTIVE | 7 |
| DATA SOURCES AND SHORTFALLS | 7 |
| WADI RUM ASSETS | 8 |
| LOCAL COMMUNITY | 9 |
| COOPERATIVES..... | 10 |
| LOCAL TOURIST PRODUCTS IN WADI RUM | 12 |
| <i>Diversity of Attractions</i> | 13 |
| <i>Range of Activities</i> | 13 |
| <i>Availability of Services</i> | 14 |
| <i>Accommodation</i> | 15 |
| TOURIST PROFILE | 17 |
| PROFILE OF THE TYPICAL VISITOR | 17 |
| NUMBER OF VISITORS..... | 19 |
| BREAKDOWN BY FOREIGN AND JORDANIAN | 21 |
| GROUP VS. FIT | 22 |
| LENGTH OF STAY: DAY AND OVERNIGHT TRIPS..... | 22 |
| <i>Overnight Visitors</i> | 22 |
| <i>Day Trip Visitors</i> | 23 |
| AVERAGE SPENDING | 24 |
| OVERNIGHT VISITOR SPENDING ESTIMATES..... | 24 |
| SAME-DAY VISITOR SPENDING ESTIMATES..... | 24 |
| TOURISM ENTERPRISES | 26 |
| EMPLOYMENT | 26 |
| MARKET SIZE | 27 |
| FORECASTING THE NUMBER OF VISITORS | 27 |
| FORECASTING TOURIST SPENDING | 28 |
| AREAS FOR IMPROVEMENT | 30 |
| NEXT STEPS | 32 |
| APPENDIX 1: DATA TABLES | 33 |
| APPENDIX 2: CLUSTER DATA AVAILABILITY / COLLECTION METHODOLOGY | 34 |

ACRONYMS

| | |
|-------|---------------------------------------|
| ASEZA | Aqaba Special Economic Zone Authority |
| FIT | Free Independent Traveler |
| MoTA | Ministry of Tourism and Antiquities |
| MSME | Medium and Small Micro Enterprises |
| NTS | National Tourism Strategy |
| WTO | World Trade 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, 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*
- 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 2002, 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 in 2005 was mostly concentrated in 5-, 4-, and 3-star hotels at 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.*
- 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.*
- 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 enterprises related to tourism was witnessed in tourist restaurants and tourist cars. The former witnessed a 45% growth and the latter a 40% growth rate over the same period. *Table 12.*

Chart 1: Breakdown of Visitors to Jordan, 2005

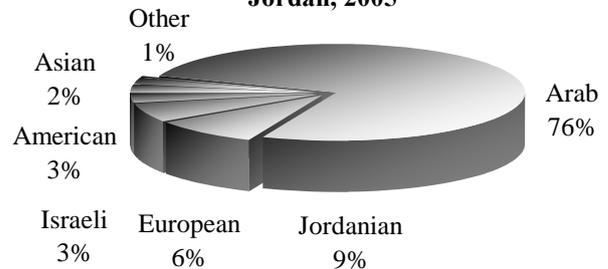
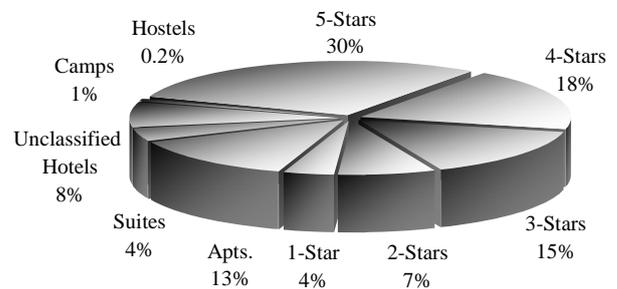


Chart 2: Distribution of Bed Nights by Hotel Classification, 2005



¹ Reference to tables is made in Appendix 1.

Executive Summary

The objective of this report, as per the SOW, is to assess and develop baseline and forecast information pertaining to Wadi Rum performance 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 Wadi Rum and helping SIYAHA fulfill its requirements to produce a program monitoring plan.

The economic profile report for Wadi Rum was developed based on the existing database at the Ministry of Tourism and Antiquities (MoTA). Moreover, a survey of visitors entitled "Key Attractions and Level of Satisfaction Survey" (referred to hereon after as the Visitor Survey) was carried out in order to capture the level of satisfaction and the critical areas that need the most improvement. The survey also aimed at filling some gaps in quantitative data.

Wadi Rum is located in the southeastern part of the country, 320 km southeast of Amman, and only 68 km north of Aqaba. The following constitute the prime assets of Wadi Rum:

- Unique and spectacular desert landscape and scenery.
- Fascinating hills and rock formations.
- Relatively affordable camping sites are available.
- Opportunity to experience Bedouin hospitality and culture.
- Indications and traces of ancient civilizations.
- A precious ecosystem environment with various rare species of animals, small plants, and herbs that can be found.
- Special unique activities can be arranged for visitors such as 4x4 vehicles tours, horseback tours along with camel riding within the Wadi and from the Wadi to other locations such as Aqaba and Petra.
- Relatively near to other touristic locations.

The population of Wadi Rum is estimated at around 3,087 persons, and is made up of 517 households or families. Inhabitants of the area work primarily in public service, tourism, agriculture, herding, and the armed forces.

Social networks and groupings play a fundamental role in the distribution of resources in Wadi Rum. These groupings include seven community business organizations (CBO), of which, one is a youth club registered at the Higher Council for Youth. CBOs include Rum, Al Disi, Borda, Al Salhiya and Al Shakriya, the Productive Village, and Al Qamar Valley Cooperatives, and the Al Disi Villages Club. Al Disi has the largest membership base with 870 members, followed by the Rum Cooperative with 565 members.

CBOs have played an instrumental role in organizing the services offered by its members to visitors, and in the distribution of resources in a manner that allows each member to benefit equally from tourism revenues. However, CBOs suffer from a weak institutional structure, as they are managed by committees that lack the needed skills in finance, management and business planning. Moreover, CBOs lack the ability to promote and market their products and services.

Wadi Rum offers an interesting range of attractions for different types of tourists specifically; geologically and culturally interested visitors, wildlife nature, and ecological observers, in addition to recreational and adventurous visitors. A good range of activities are currently offered, namely, jeep tours, camel and horse rides, hiking, climbing, trekking, and camping.

Camel rides are not as popular as the jeep rides, which is unfortunate since the camel is a central figure to Bedouin life. This is so for a number of reasons. Foremost, a sizeable number of visitors to Wadi Rum are on package tours and their allotted time is usually limited; therefore, jeep rides are considered to be the fastest mode of transportation available in Wadi Rum that would allow a wide viewing range of the area in a short period of time. Secondly, jeep drivers are more experienced with tourists and act as tour guides. Camel masters tend to be young, untrained to deal with tourists, and inexperienced tour guides. Thirdly, and this applies more to independent travelers who have the flexibility of choosing their preferred mode of transportation, the Visitor Center has more information on jeep rides and routes than on camel ride options.

Based on the visitor survey, it was revealed that the majority of travelers to Wadi Rum characterize themselves to be traveling in style and comfort. Around 65% of them described their traveling style as 4-stars and above. The average price for the tour paid by the visitors interviewed at Wadi Rum ranged from US1,600 to 2,300 per person. The survey also revealed that travelers to Wadi Rum represent a somewhat even distribution of age groups.

The natural beauty and landscape of Wadi Rum is by far the main attraction for travelers. The survey revealed that the majority of travelers (82%) arrive to Wadi Rum after they visit Petra. After their visit to Wadi Rum, they are most likely to head to Aqaba. The southern tourist sites (Aqaba, Petra and Wadi Rum golden triangle) appear to be the tourists' final destinations on their Jordan trip. Most travelers have already visited the other major sites such as Amman (67%), Mount Nebo (53%), Jerash (53%), Madaba (46%) and the Dead Sea (39%).

The survey also revealed that the majority of visitors (71%) spent the night in Petra prior to their arrival to Wadi Rum, and most of them (40%) will head to Aqaba for their next overnight stop. Moreover, only one third of visitors to Wadi Rum were overnight campers. Visitors to Wadi Rum are mostly on package tours followed by those traveling with family and friends. The survey revealed that only one in ten visitors are independent travelers.

The following is a summary of salient indicators:

- The total number of visitors increased from 30,426 in 2002 to 129,178 in 2005, representing a growth of 125% over the entire period². *Appendix 1, Table 13-a.*
- The number of visitors is projected to range between 165,000 to around 208,000 by the year 2010.

² There is discrepancy in the data generated by the Visitor Center at Wadi Rum and MoTA regarding the number of visitors. Reference throughout the report will be made to both when applicable.

- Around 83% of arrivals were Europeans, followed by Jordanians and Asians as illustrated in chart 3. *Appendix 1, Table 14-a*
- The peak in the number of visitors in 2005 occurred twice: once in April and the other in October. *Appendix 1, Table 18-a*
- The number of tourists on package tours reached 32,231 in 2005 according to MoTA. Number of tourist nights for the same year amounted to 43,221 thereby generating an average length of stay of 1.34 days per overnight tourist. *Appendix 1, Table 19.*
- The number of FITs are estimated at 96,947 persons in 2005.
- There are 34 camps inside the protected area³, and 5 camps outside. *Appendix 1, Table 20.*
- The number of day trip visitors is estimated at around 110 thousand.
- The cost of camping per night is estimated at JD35 for foreigners and JD25 for Jordanians.
 - Foreign campers spend an average of JD46.9 per person on accommodation per total stay. This rate goes down to JD33.5 for Jordanians.
- The number of jobs in tourism activities, as reported by MoTA witnessed a sizeable jump from 583 in 2004 to 969 in 2005. *Appendix 1, Table 22.*
- The number of campers outside the protected area was estimated by MoTA at 19,059 in 2005. *Appendix 1, Table 23.*
- The number of rooms and beds at the camps outside the protected area witnessed a marked increase over the past few years. The number of rooms jumped from 1,445 in 2002 to 14,830 in 2005, and the number of beds increased from 2,983 to 26,439 over the same period. *Appendix 1, Table 23.*
- The majority of bed nights in 2005 were spent by visitors from France (37%), followed by British (12%), Israelis (9%), and Jordanians (6%). *Appendix 1, Table 24.*
- Market size - spending of overnight visitors to Wadi Rum - is expected to range between JD1.35-1.64 million by the year 2010.

Recommendations for next steps to be taken are listed below:

- Build a reliable database system that covers visitors inside and outside the protected area. Data on visitors must be stratified by nationality, and form of travel (package, FIT, etc.). It should also provide time spent by daytime travelers, and nights spent by overnight campers. Camp owners, particularly those that

³ Source: ASEZA

arrange trips directly with the travel agents and not through the Visitor Center, must collaborate to provide this data. This should also be coordinated with MoTA.

The database should also include accurate data on tourism enterprises and employment inside and outside the protected area, in addition to jobs created by cooperatives. This information can be collected from registered camp-owners, and from the database at the Visitor Center.

- 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"⁴.
- Track revenue/performance of cooperatives in order to measure income from tourism.

⁴ Trip Report – Market Research Studies.

Objective

The objective of this report, as per the SOW, is to assess and develop baseline and forecast information pertaining to Wadi Rum performance 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 Wadi Rum and helping SIYAHA fulfill its requirements to produce a program monitoring plan.

Data Sources and Shortfalls

The economic profile report for Wadi Rum 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 were screened, a matrix was constructed in order to identify the gaps in data, and the methodology to fill in the gaps.⁵

As such, a survey of visitors entitled "Key Attractions and Level of Satisfaction Survey"⁶ (referred to hereon after as the Visitor Survey) was carried out in order to capture the level of satisfaction and the critical areas that need the most improvement in order to better meet the needs and expectations of visitors to Wadi Rum. The survey also aimed at filling some gaps in quantitative data such as tourist spending, and average length of stay.

The report also extracted some relevant information on the local community from a socioeconomic survey that was conducted in the four villages of Wadi Rum in April 2006 by Siyaha.

Shortfalls in data can be summed as follows:

- A) **Number of Visitors:** there is a discrepancy between the number of visitors that is generated by MoTA and the number generated by the Visitor Center. The numbers however are very close and exhibit a similar pattern⁷. For purposes of this report, MoTA data will be used because it extends back to the year 2002, whereas the data generated by the Visitor Center is only available for the years 2004 and 2005. Moreover, MoTA's data is more extensive.
- B) **Visitor Survey:** the survey attempted to generate base point data on a number of critical indicators such as tourist spending, average stay, and visitor satisfaction. The survey was conducted during high traffic season and at the most accessible area of Wadi Rum. The survey assumes that it did not capture

⁵ Availability of data and data collection methodology are detailed in Appendix 2.

⁶ Survey of Visitors - Key Attractions and Level of Satisfaction conducted in May 2006. Two survey instruments were used: entrance and exit questionnaires. The target quota was 200 at the entrance and 100 at the exit. Face to face interviews were conducted with 194 persons entering Wadi Rum and 79 persons exiting Wadi Rum. The sample was randomly selected with an approximate margin of error on the research conducted at Wadi Rum of 4.86% (+/- 0.5%).

⁷ Refer to Tables 14-a, 14-b, 18-a, and 18-b in Appendix 1.

the opinions of those who spend more than 24 hours at the site. A number of base points must be generated in order to create a base line.

- C) **Overnight Arrivals:** data on overnight arrivals is only available for campers outside the protected area as generated by MoTA. This overlooks a substantial number of campers inside the protected area, which houses 34 camps. Therefore, estimation of daytime visitors was derived, but it is *nowhere* near accurate.

Wadi Rum Assets

Wadi Rum is located in the southeastern part of the country, 320 km southeast of Amman, and only 68 km north of Aqaba. It comprises part of the southern desert with a total area of 720 km².

Wadi Rum is known to be an ideal location for camping, hiking, climbing and trekking adventures, especially since some of its mountain peaks reach about 1,700 meters above sea level.

Within the mountainous deserts, there are several available camping sites, ranging from wildlife to Bedouin-style campsites, offering an array of facilities and entertainment. Furthermore, being an environmentally protected area, Wadi Rum, provides a firsthand opportunity for visitors to experience the wildlife eco-system nature and the traditional Bedouin life style, which are still largely retained.

Other unique customized activities include the jeep tours within different tour routes, camel tours – the most traditional and eco-friendly transportation form in the desert, in addition to horseback tours.

The following constitute the prime assets of Wadi Rum:

- **Unique and spectacular desert landscape and scenery** that continues to attract a growing number of visitors from all over the world.
- **Fascinating hills and rock formations** known as “Jabals” reaching heights of more than 1,700 meters, thus, providing a challenging experience for all those adventure-seeking climbers and hikers.
- **Relatively affordable camping** sites are available.
- **Opportunity to experience Bedouin hospitality** and culture.
- **Archeological visitors can view many indications and traces of ancient civilizations** found within many carved inscriptions and ancient rock drawings.
- **A precious ecosystem environment** of 720 km², with various rare species of animals, small plants, and herbs that can be found. It is also known to be a bird-watching haven especially during migration seasons. It is the natural

habitat for more than 180 types of plants and 275 types of animals. Some of these plans and animals are considered rare.

- **Special unique activities** can be arranged for visitors such as 4x4 vehicles tours, horseback tours along with camel riding within the Wadi and from the Wadi to other locations such as Aqaba and Petra.
- **Relatively near to other touristic locations;** namely Aqaba (68 km to the south), Petra (120 km to the north), and Dana Nature Reserve.

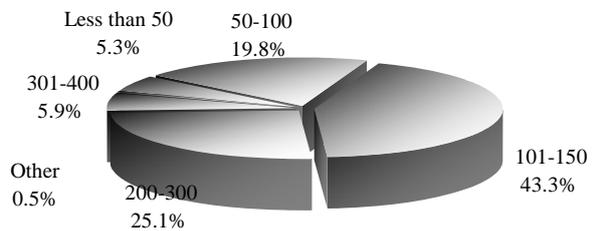
Local Community

The population of Wadi Rum is estimated at around 3,087 persons, and is made up of 517 households or families. Inhabitants of the area work primarily in public service, tourism, agriculture, herding, and the armed forces.

The main villages of Wadi Rum include Rum, Disi, Shakriya and Salhiya. Residents of the main village, Rum, earn their income primarily from tourism. There are three main Bedouin tribes in Wadi Rum; the Zalabia tribe, which resides in the village of Rum, the Zawaida in Disi, and the Swailheen in the villages of Shakriya and Salhiya.

Illiteracy rate in Wadi Rum is considered to be one of the highest in the country. Based on a socioeconomic survey that was conducted by Siyaha in May 2006⁸, illitracy rate was estimated at 22.9% amongst men, and at an alarming 47.3% amongst women. Moreover, 77% of the surveyed females, and 42.7% of the surveyed males had no more than primary schooling. Naturally, family income was found to be low. It was estimated that the majority of families (43.3%) earn between JD100 and JD150 per month per family (*see chart 3*). A mere 5.9% earn more than JD300. The average family size was found to be between 6 and 10 members (56.2%).

Chart 3: Breakdown of a Family's Monthly Income in Wadi Rum (JD)



It was estimated that the majority of families (43.3%) earn between JD100 and JD150 per month per family (*see chart 3*). A mere 5.9% earn more than JD300. The average family size was found to be between 6 and 10 members (56.2%).

The vast majority of respondents (91.4%) would like their male children, to attain a college degree or more (post graduate). This figure drops to 69.4% for their female children, which is impressive given the fact that almost half of the female respondents were illiterate.

Over one-third of the surveyed males had jobs in the public sector, followed by 9.4%, 7.3%, and 6.3% in the armed forces, private and tourism sectors respectively. Around 19% were retired, and a high 23% were unemployed as illustrated in Table 1. The picture for females differs significantly. The overwhelming majority of those

⁸ A sample of 187 individuals were surveyed from four villages Rum (34.2%), Disi (31.6%), Shakriya (16%) and Salhiya (18.2%). 51.3% of respondents were males. Results of the Survey can be found in Appendix

surveyed were housewives (87.9%), and 8.8% were unemployed. Out of the 91 surveyed females, only two were employed by the private sector and one was retired.

Table 1: Distribution of Employment

| | Males | | Females | | Total | |
|----------------|-----------|-------------|-----------|------------|------------|------------|
| | (#) | (%) | (#) | (%) | (#) | (%) |
| Public Sector | 34 | 35.4% | 0 | 0 | 34 | 18.2% |
| Private Sector | 7 | 7.3% | 2 | 2.2% | 9 | 4.8% |
| Tourism | 6 | 6.3% | 0 | 0 | 6 | 3.2% |
| Armed Forces | 9 | 9.4% | 0 | 0 | 9 | 4.8% |
| Retired | 18 | 18.8% | 1 | 1.1% | 19 | 10.2% |
| Unemployed | 22 | 22.9% | 8 | 8.8% | 30 | 16% |
| Housewife | 0 | 0 | 80 | 87.9% | 80 | 42.8% |
| Total | 96 | 100% | 91 | 100 | 187 | 100 |

Although the total number of respondents that worked in tourism was low (9 out of 187), two-thirds of those surveyed indicated their interest in shifting to tourism. Although tourism is a major economic driver in Wadi Rum, the majority of respondents preferred that their children work in the public sector. In their opinion, a job in the government provides security and income stability, as opposed to income fluctuation that comes from the seasonality of tourism.

The local community regards tourism to have a negative impact on society. The majority of those surveyed (80.7%) believed that their youth are susceptible to picking up bad habits from tourists, such as smoking, drinking, and taking drugs.

Cooperatives

Social networks and groupings play a fundamental role in the distribution of resources in Wadi Rum. These groupings include seven community business organizations (CBO), of which, one is a youth club registered at the Higher Council for Youth. CBOs include Rum, Al Disi, Borda, Al Salhiya and Al Shakriya, the Productive Village, and Al Qamar Valley Cooperatives, and the Al Disi Villages Club. Al Disi has the largest membership base with 870 members, followed by the Rum Cooperative with 565 members⁹.

Rum, Disi, Al Salhiya and Al Shakriya Cooperatives are concerned with organizing tourism activities, and enabling their members to receive an equal stake of tourism receipts. Members of the cooperatives offer tourists a wide array of services. These include camel, horse and jeep rides; tour guides; hiking; and camping. Cooperatives liaise between tourism entities and the varied aforementioned services that are offered by its members.

Al Qamar Cooperative was recently established as a multipurpose tourism cooperative. It has 16 members.

⁹ Information derived from report entitled "In-depth Assessment of CBOs participating in Siyaha Project"

In 2005, the Rum Cooperative generated the highest revenues for its members as illustrated in Table 2, reaching in value JD50,484, or what is equivalent to a mere JD0.24/person/day. The daily per person revenue for the Disi Cooperative was JD0.07/person/day, and for the Salhiyah & Shakriyah Cooperative JD0.06/person/day.

Table 2: Revenues Generated by the Rum Cooperative from Tourist Rides

| | Rum | | Disi | | Salhiyah & Shakriyah | | Total | |
|--------------|---------------|---------------|---------------|---------------|----------------------|--------------|----------------|---------------|
| | # of Visitors | Revenue | # of Visitors | Revenue | # of Visitors | Revenue | # of Visitors | Revenue |
| January | 3,299 | 2,309 | 1,090 | 763 | 187 | 131 | 4,576 | 3,203 |
| February | 4,253 | 2,977 | 1,123 | 786 | 249 | 174 | 5,625 | 3,937 |
| March | 9,002 | 6,301 | 3,846 | 2,694 | 493 | 345 | 13,341 | 9,340 |
| April | 10,105 | 7,074 | 4,494 | 3,146 | 649 | 454 | 15,248 | 10,674 |
| May | 7,510 | 5,257 | 3,033 | 2,123 | 564 | 395 | 11,107 | 7,775 |
| June | 3,989 | 2,792 | 1,535 | 1,075 | 311 | 218 | 5,835 | 4,085 |
| July | 4,182 | 2,927 | 2,023 | 1,416 | 345 | 242 | 6,550 | 4,585 |
| August | 6,648 | 4,654 | 1,960 | 1,372 | 281 | 197 | 8,889 | 6,223 |
| September | 6,457 | 4,520 | 2,134 | 1,494 | 312 | 218 | 8,903 | 6,232 |
| October | 6,984 | 4,889 | 3,190 | 2,233 | 217 | 152 | 10,391 | 7,274 |
| November | 7,091 | 4,964 | 3,461 | 2,423 | 88 | 62 | 10,640 | 7,449 |
| December | 2,600 | 1,820 | 1,997 | 1,398 | 93 | 65 | 4,690 | 3,283 |
| Total | 72,120 | 50,484 | 29,889 | 20,922 | 3,789 | 2,652 | 105,798 | 74,058 |

Source: Siyaha

The Productive Village and Borda Cooperatives were established with the objective of upgrading the standard of living of their members and their families. Borda specializes in the making of indigenous handicraft textile and soap from olive oil. It has 63 members that are all women. Products of the cooperative are currently sold at the Visitor Center, and the income generated is distributed amongst its members. The Productive Village was recently established and has a membership base of 23 persons. The cooperative plans to conduct workshops on leather handicrafts, silver, and henna products. It also owns one lot of land, which it plans to turn into a campsite.

CBOs have played an instrumental role in organizing the services offered by its members to visitors, and in the distribution of resources in a manner that allows each member to benefit equally from tourism revenues. However, CBOs suffer from a weak institutional structure, as they are managed by committees that lack the needed skills in finance, management and business planning. Moreover, CBOs lack the ability to promote and market their products and services.

Local Tourist Products in Wadi Rum

Wadi Rum’s tourist products consist mainly of recreational activities, organized tours, in addition to the cultural and eco-touristic attractions. Table 3 below provides a summary of the current tourist products and the future projections.

Table 3: Summary of Current and Projected Tourist Products

| Tourist Products | Current | Future Projections ¹⁰ |
|----------------------------|--|---|
| 1- Cultural Attractions | <ul style="list-style-type: none"> • Ancient rock drawings and inscriptions. • Bedouin lifestyle experienced firsthand by visitors. | <ul style="list-style-type: none"> • Supporting the authentic Bedouin experience and identity (through decorations, furniture and activities), performing Bedouin weddings. • Developing extensive maps and guides in various languages • Better management of archeological sites. • Developing Rum Fortress as a tourist attraction (pictures, photography, camel exhibition, gift shops, teahouse, etc. to be developed). |
| 2- Recreational Activities | <ul style="list-style-type: none"> • Several hiking trails with different lengths and “toughness” levels. • Climbing activities are available with experienced guides. | <ul style="list-style-type: none"> • Establishment of a hiking club and promoting this sport. • Facilitate health and life insurance for guides and tourists. • Marketing channels and plans. • Establishing “Train the Trainers” program, and training a new group of climbers from the local community. • Procurement of new equipment. • Advanced CPR and emergency response training and facilities for tour guides. |
| 3- Tours | <ul style="list-style-type: none"> • Camel riding tours lasting from 1 hour to several days. • Horseback tours • Several jeep tours are available, customized tours can be arranged upon request. | <ul style="list-style-type: none"> • Developing desert tours (aero sports, motor biking, survival skills, caravans and trekkers, etc.) • Increasing the role of camels in transport • Costumes of camels and camel owners; requiring comfortable saddles and other necessary equipment. • Training vehicle drivers on guiding and tour ethics. • Ensuring safety measurements are taken, as well as taking any safety improvements whenever needed. • Enhance durability (car mechanics) • Classification, licensing, insurance and maintenance standards of the vehicles. |
| 4. Eco-Tourism | <ul style="list-style-type: none"> • Desert wildlife, with a precious eco-system consisting of various rare species. | <ul style="list-style-type: none"> • Preserving the eco-system through increasing the role of camels in transportation since they are environmentally-friendly. • Supporting and upgrading camp facilities according to environmentally-friendly standards. |

¹⁰ As stated in the “Community Assessment Results Opportunities and Needs” and “Wadi Rum Cluster Assessment” Reports.

Tourism Product Assessment

Diversity of Attractions

Wadi Rum offers an interesting range of attractions for different types of tourists specifically; geologically and culturally interested visitors, wildlife nature, and ecological observers, in addition to recreational and adventurous visitors.

Range of Activities

A good range of activities are currently offered, namely, jeep tours, camel and horse rides, hiking, climbing, trekking, and camping. Additional activities can be capitalized on such as story telling, Bedouin survival techniques, Bedouin cuisine, Bedouin wedding, and sunset viewing tents.¹¹

The landscape, natural setting, and camel rides comprise the most memorable experience from visiting Wadi Rum. Riding camels is authentic and regarded as the best method to experience the natural beauty of Wadi Rum and acquire a feel of its local culture.

Based on the Visitor Survey, around half of the visitors to Wadi Rum did not try camel and horse rides because only jeep rides were arranged for their trip. The quality of service was perceived to be acceptable, and the level of satisfaction with the jeep ride was predominantly above average as can be seen in Table 4. Around 10% of respondents were dissatisfied with their jeep ride, and mentioned that they would not recommend it to others.

Table 4: Visitors Level of Satisfaction with Rides offered in Wadi Rum

| | Camel Ride | Horse Ride | Jeep Ride |
|-------------|------------|------------|-----------|
| Very Low | 0% | 0% | 7% |
| Low | 1% | 4% | 3% |
| Average | 16% | 11% | 32% |
| High | 28% | 17% | 41% |
| Very High | 8% | 7% | 15% |
| Did Not Try | 47% | 60% | 3% |

Camel rides are not as popular as the jeep rides, which is unfortunate since the camel is a central figure to Bedouin life. This is so for a number of reasons. Foremost, a sizeable number of visitors to Wadi Rum are on package tours and their allotted time is usually limited; therefore, jeep rides are considered to be the fastest mode of transportation available in Wadi Rum that would allow a wide viewing range of the area in a short period of time. Secondly, jeep drivers are more experienced with tourists and act as tour guides. Camel masters tend to be young, untrained to deal with tourists, and inexperienced tour guides. Thirdly, and this applies more to independent travelers who have the flexibility of choosing their preferred mode of transportation, the Visitor Center has more information on jeep rides and routes than on camel ride options.

¹¹ Wadi Rum Marketing and Product Development Report.

Based on the Visitor Survey, around 20% of visitors perceived the jeep rides to be unsafe and even dangerous. This is also reflected in the assessment of the comfort level of the ride as illustrated in Table 5. Comfort and safety are the most critical attributes to an enjoyable visit to Wadi Rum.

Table 5: Visitors' Assessment of Jeep Rides in Wadi Rum

| | Safety | Comfort | Price |
|-------------|--------|---------|-------|
| Very Low | 5% | 7% | 5% |
| Low | 15% | 15% | 8% |
| Average | 35% | 41% | 40% |
| High | 31% | 27% | 12% |
| Very High | 11% | 5% | 3% |
| Did Not Try | 4% | 7% | 32% |

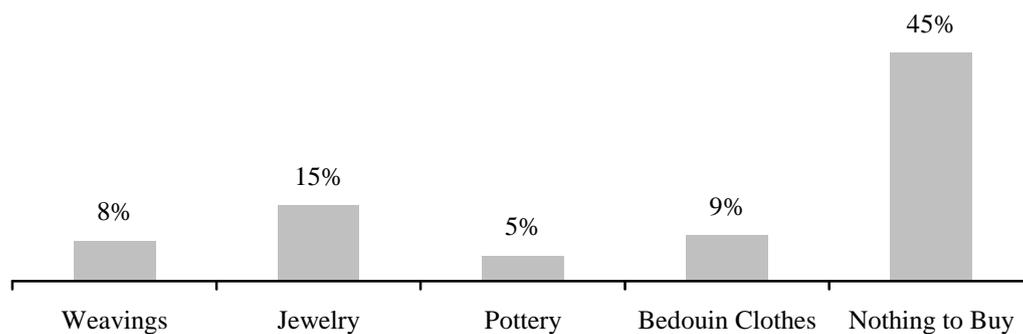
Availability of Services

A good number of vehicles, camels, and horses are available. Tours and camping trips can be easily arranged at the Visitor Center.

The Visitor Center was admired for its quality and authenticity that captures the gist of the Bedouin culture. Nonetheless, visitors – and particularly females, found the center to be "lifeless".

The Center has a number of outlets that sell souvenirs. Some souvenirs are produced by the local community (cooperatives). The majority of visitors ranked the selection of merchandise to be average and below. Almost every other visitor revealed that there is "nothing unique" to purchase as illustrated in Chart 4.

Chart 4: Popular Gifts



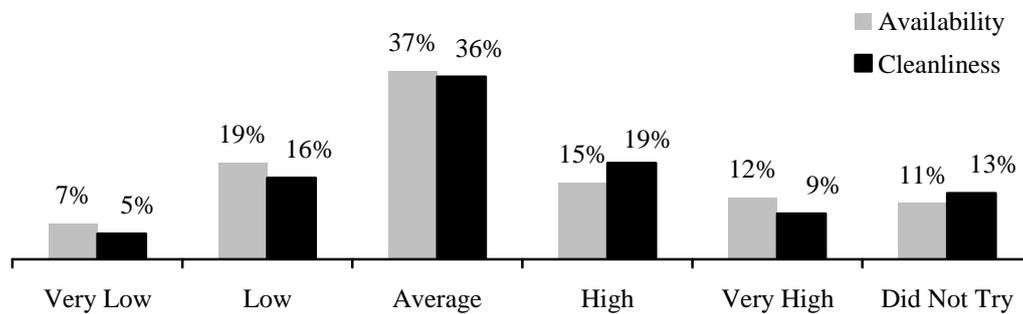
The purchasing behavior of respondents was as follows:

- 56% purchased at least one gift and/or service
- 81% of those that made a purchase, paid over and above prepaid package
- 50% of those that made a purchase bought a gift

On average, it was found that visitors spend between 6 to 8 hours, and have three designated areas for rest and bathroom breaks. Visitors' assessment of the rest area was very positive in terms of comfort. Bathroom facilities were found to be generally

clean. Around one fourth of visitors found bathroom availability to be below average (low to very low) as illustrated in chart 5 below.

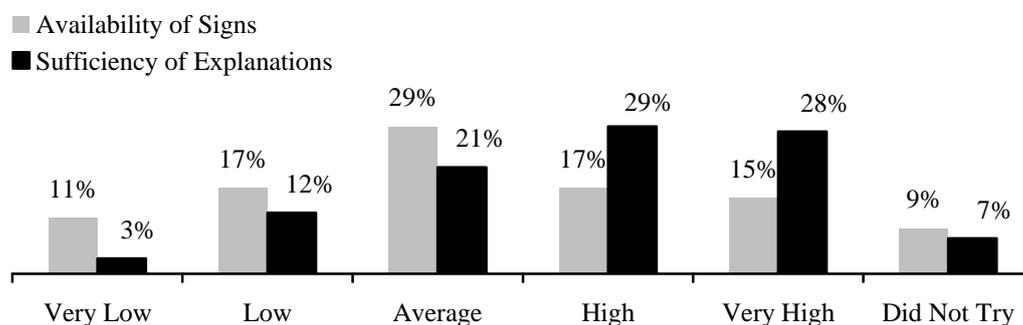
Chart 5: Bathroom Facilities



The quality of tour guides in Wadi Rum was highly rated, and perceived to be the best in Jordan. Over 70% of respondents believed that the tour guides were highly professional. Only 3% of visitors ranked tour guides to be below average.

Regarding signage and explanation, visitors believed that they could use some improvement. According to the respondents, there is a lack of maps, brochures and other explanatory material that can be obtained from the Visitor Center.

Chart 6: Signage & Explanation



Accommodation

Camping is the only form of accommodation available, and it is widely spread across the deserts, nevertheless, in order to upgrade the facilities, certain standards need to be set and sustained.

More than half of the surveyed respondents did not spend the night in Wadi Rum ('did not try' in Table 6). Those who spent the night in Wadi Rum regarded the quality of the camps to be satisfactory. Around 8% of them regarded the overall cleanliness to be below average, and the majority of them perceived the camps to be safe.

Table 6: Visitors' Assessment of Camps in Wadi Rum

| | Quality | Safety | Cleanliness | Price |
|----------|---------|--------|-------------|-------|
| Very Low | 0% | 1% | 1% | 3% |
| Low | 4% | 1% | 7% | 1% |

Economic Profile of the Wadi Rum Cluster

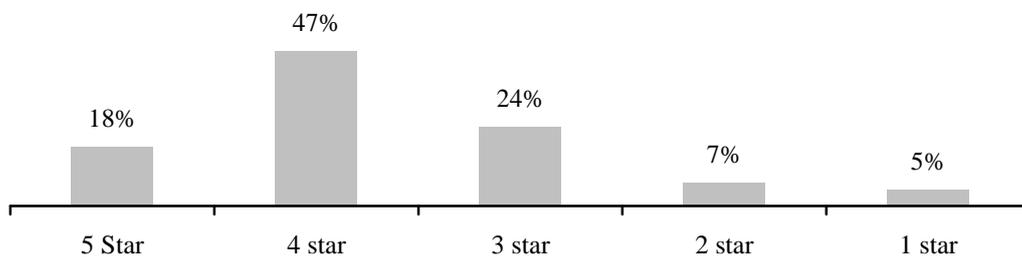
| | | | | |
|-------------|-----|-----|-----|-----|
| Average | 13% | 13% | 12% | 12% |
| High | 9% | 11% | 13% | 8% |
| Very High | 12% | 11% | 5% | 4% |
| Did Not Try | 59% | 60% | 57% | 68% |

Tourist Profile

Profile of the Typical Visitor

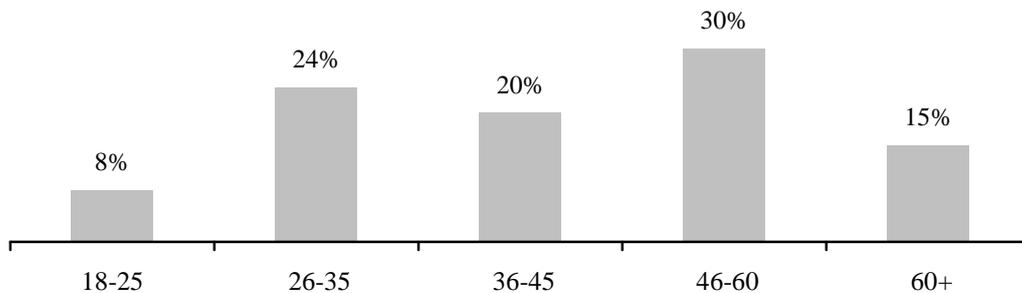
Based on the visitor survey, it was revealed that the majority of travelers to Wadi Rum characterize themselves to be traveling in style and comfort. Around 65% of them described their traveling style as 4-stars and above as indicated in chart 7 below. The average price for the tour paid by the visitors interviewed at Wadi Rum ranged from US1,600 to 2,300 per person.

Chart 7: Profile of Travelers to Wadi Rum |



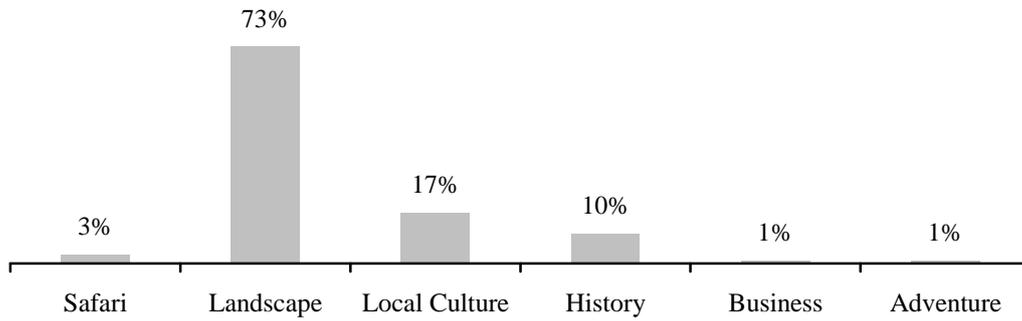
The survey also revealed that travelers to Wadi Rum represent a somewhat even distribution of age groups as shown in chart 8.

Chart 8: Age Group of Travelers to Wadi Rum |



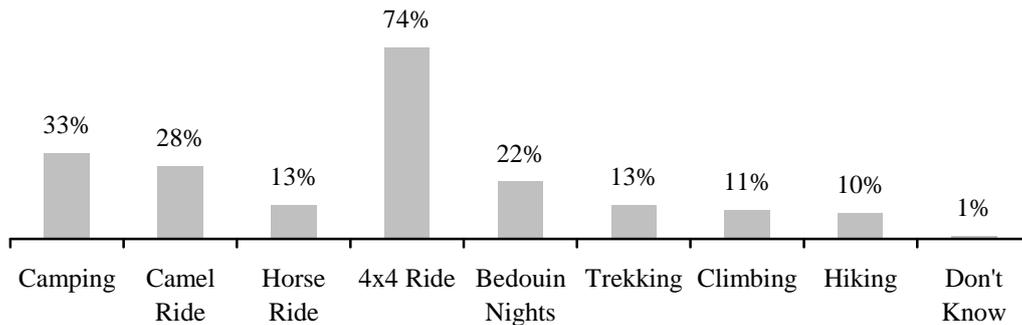
The natural beauty and landscape of Wadi Rum is by far the main attraction for travelers. The survey revealed that 73% of respondents were attracted to the landscape, followed by 27% that wanted to experience local culture and history as illustrated in chart 9 below.

Chart 9: Main Attraction to Wadi Rum



Camping with Bedouins, camel and horse rides are activities that travelers are generally aware of from travel books and magazines. Travelers are not well aware of sports and adventure activities as illustrated in the chart 10 below.

Chart 10: Activities Travelers are Familiar with in Wadi Rum



Nonetheless, once on site, a number of visitors showed interest in trying activities other than those planned on their itineraries. These include mostly jeep rides, Bedouin nights, camping, and camel rides. Interest in sports and adventurous activities was minimal. This is expected because the respondents were not categorized as adventurous tourists.

The survey revealed that the majority of travelers (82%) arrive to Wadi Rum after they visit Petra as shown in chart 11. After their visit to Wadi Rum, they are most likely to head to Aqaba. The southern tourist sites (Aqaba, Petra and Wadi Rum golden triangle) appear to be the tourists' final destinations on their Jordan trip. Most travelers have already visited the other major sites such as Amman (67%), Mount Nebo (53%), Jerash (53%), Madaba (46%) and the Dead Sea (39%).

The survey also revealed that the majority of visitors (71%) spent the night in Petra prior to their arrival to Wadi Rum, and most of them (40%) will head to Aqaba for their next overnight stop as illustrated in chart 12. Moreover, only one third of visitors to Wadi Rum were overnight campers.

Chart 11: Most Visited Sites

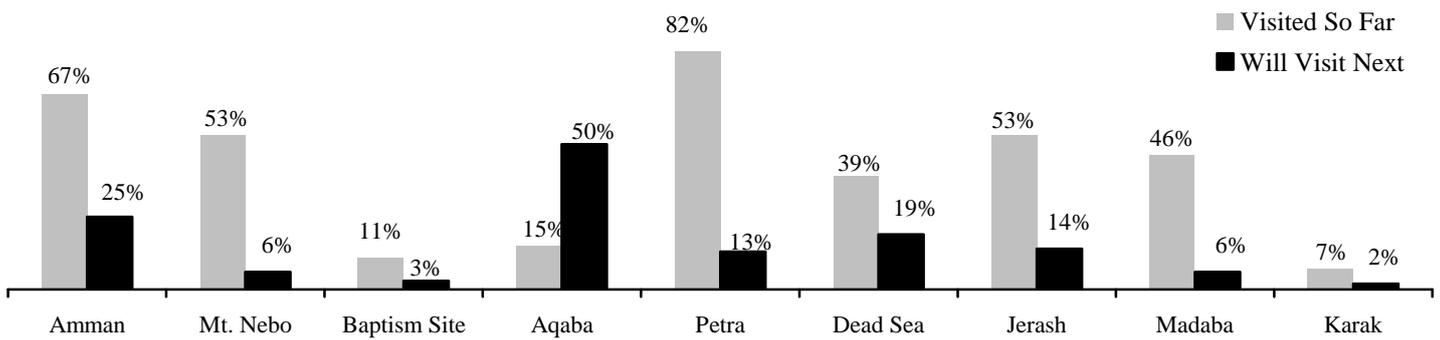
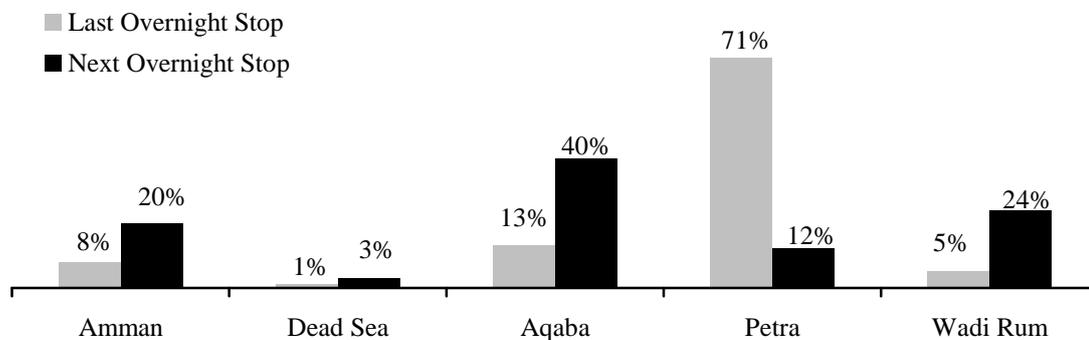


Chart 12: Overnight Stops



Visitors to Wadi Rum are mostly on package tours followed by those traveling with family and friends. The survey revealed that only one in ten visitors are independent travelers¹².

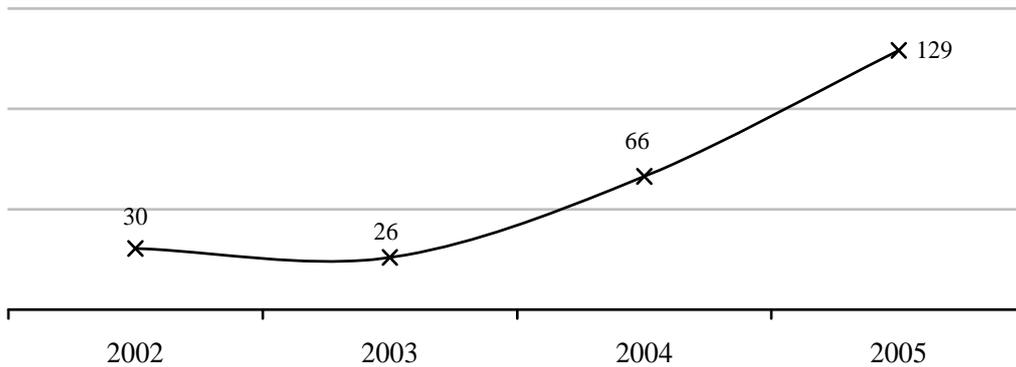
Number of Visitors

- **Number:** According to MoTA, the number of visitors to Wadi Rum reached around 129,178 in Wadi Rum. Data generated from the Visitor Center estimate this number at 131,311 *For more details refer to Appendix 1, Table13.*

As illustrated in chart 13 below, the number of visitors has been steadily rising since 2003 recording an average annual growth rate of around 78%.

¹² This contradicts data from MoTA

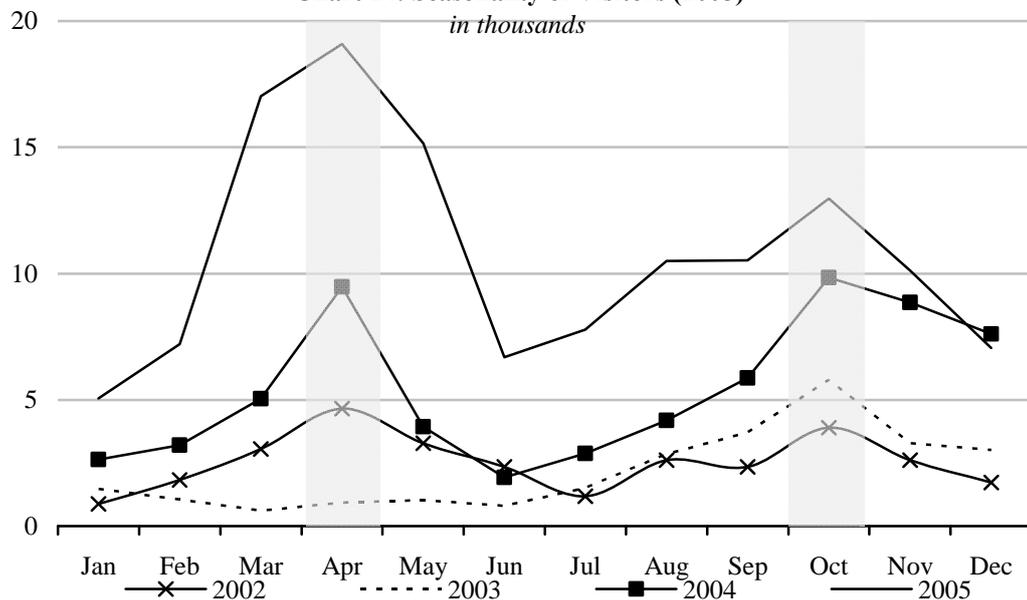
Chart 13: Number of Visitors to Wadi Rum (2002-2005)
in thousands



- Seasonality:** The visiting seasons exhibit the same pattern. As illustrated in chart 14 below, the peak in the number of visitors occurred twice in 2005, once in April and another in October. For more details refer to Appendix 1, Tables (15-18)

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

Chart 14: Seasonality of Visitors (2005)
in thousands



- Captured Market¹³:** In 2005, the total number of package tourists at the national level was estimated at around 340 thousand. Wadi Rum captured around 9.5% of the package tourist market in 2005 as indicated in Table 7 below. Tourists on package tours give a better indication of the tourist market since there is no clear mechanism to count the total number of Free Independent Travelers (FIT).

¹³ Assumption to be discussed with Siyaha

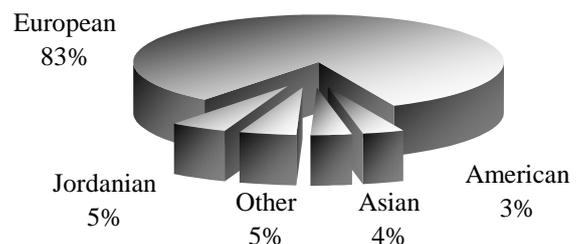
Table 7: Package Tourists Visiting Wadi Rum

| Number | 2005 |
|--|---------|
| No. of Package Tourists / National Level | 338,787 |
| No. of Package Tourists / Wadi Rum | 32,231 |
| (%) Captured | 9.5% |

Breakdown by Foreign and Jordanian

- The overwhelming majority of those who visited Wadi Rum in 2005 were European nationals as illustrate in Chart 15. European visitors comprised around 83% of total visitors, followed by Jordanians (5%), and Asians (4%). *For more details refer to Appendix 1, Table 14.*

Chart 15: Breakdown of Visitors to Wadi Rum, 2005



- European nationals are mostly Spanish, French, British, Italian, and German, followed by Austrian, Dutch, Swiss and Belgian.
- Asian nationalities are predominantly from Japan, followed by Malaysia, Hong Kong and Singapore.
- Wadi Rum is becoming a more popular attraction for adventurous Jordanians. Their numbers witnessed a marked increase from 1,436 in 2003 to 6,429 in 2005, representing a growth of 350% over the whole period.
- In general, the number of tourists has been on the rise since 2002. Table 8 below illustrates the visiting trends of tourists to Wadi Rum by region/country of origin.

Table 8: Visiting Trend by Nationality (2002-2005)

| Nationality | Trend | Avg. Annual Growth (%) |
|-------------|--|------------------------|
| American* | The number of American nationals, although on the rise since 2003, still lags far behind European visitors to Wadi Rum. The number of Americans increased from around 660 in 2003 to over 4,360 in 2005. | 89% |
| European | Europeans represent the largest segment of visitors to Wadi Rum (83%). Their numbers witnessed an impressive 175% growth in 2004, followed by a 97% growth in 2005 to reach over 107 thousand persons. | 85% |
| Asian | The number of Asian visitors has been steadily rising from 816 in 2002 to 4,830 in 2005, representing an annual growth of 85%. | 85% |
| Arab | Wadi Rum is not a main attraction for Arab visitors. 2005 witnessed a drop of 44%. Total number reached a modest 1,835 in 2005. | 70% |

| <i>Nationality</i> | <i>Trend</i> | <i>Avg. Annual Growth (%)</i> |
|--------------------|---|-------------------------------|
| Israeli | The number of Israelis witnessed a steady rise between 2002 and 2004. 2005 saw a major jump in numbers reaching around 3,000. | 183% |
| Jordanian | More and more adventurous Jordanians are visiting Wadi Rum. Their numbers increased from around 1,450 in 2003 to over 6,400 in 2005. | 55% |
| African | Steady growth, but negligible numbers. | 68% |
| Total | Remarkable recovery in 2004 after a 14% drop in 2003. 2004 witnessed a 155% increase in the number of visitors followed by a 94% growth in 2005. | 78% |

*includes US, Canadian and other South American Nationals

Group vs. FIT

- In 2005, a total of 129,178 persons visited Wadi Rum; of which, 32,231 were recorded to be on package tours.
- By subtracting the number of tourists on package tours from the total number of visitors we can obtain an estimate for FITs. **Subsequently, FITs are estimated at 96,947 persons in 2005.**
- The number of package tourist nights amounted to 43,221 in 2005, which translates into an average length of stay of 1.34 days as can be seen in Table 9 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 19.*

Table 9: Tourists, Tourist Nights, and Length of Stay for Package Tours, 2005

| | Wadi Rum | National |
|--------------------------|-----------------|-----------------|
| Number of Tourists | 32,231 | 338,787 |
| Number of Tourist Nights | 43,221 | 1,538,233 |
| Average Length of Stay | 1.34 | 4.5 |

Source: MOTA

Length of Stay: Day and Overnight Trips

Overnight Visitors

- The number of overnight visitors, outside the protected area, reached slightly over 19 thousand in 2005, up from around 5 thousand in 2003 as can be seen in Table 10 below¹⁴.

¹⁴ Data on overnight visitors inside the protected area, which houses 34 camps, is not available.

Table 10: Arrivals-Bed Nights by Nationality/ Outside Protected Area in Wadi Rum

| | 2003 | | 2004 | | 2005 | |
|--------------|--------------|--------------|---------------|---------------|---------------|---------------|
| | Arrivals | Bed Nights | Arrivals | Bed Nights | Arrivals | Bed Nights |
| American | 140 | 251 | 461 | 584 | 424 | 542 |
| European | 4,057 | 6,074 | 7,573 | 8,413 | 13,987 | 20,585 |
| Asian | 37 | 38 | 99 | 99 | 154 | 163 |
| Arab | 12 | 12 | 410 | 410 | 994 | 1,064 |
| Israeli | 447 | 493 | 969 | 987 | 1,928 | 2,255 |
| Jordanian | n.a. | n.a. | 997 | 997 | 1,425 | 1,661 |
| African | 19 | 19 | 8 | 8 | 17 | 19 |
| Other | 200 | 205 | 91 | 110 | 130 | 150 |
| Total | 4,912 | 7,092 | 10,608 | 11,608 | 19,059 | 26,439 |

Source: MoTA

- Over the last four years, the number of bed nights witnessed a sizeable growth from around 3,000 in 2002 to over 26,400 in 2005 as can be seen in Table 11 above. This growth was propelled primarily by the increase in the number of European overnight visitors, which amounted to an average of 92% per annum.
- European overnight visitors spent a total of 20,585 bed-nights in 2005, followed by Israelis and Jordanians at 2,255 and 1,661 bed nights respectively.
- The 19,059 arrivals (overnight visitors) in 2005 spent 26,439 bed-nights. This translates into an average length of stay of 1.4 nights for overnight arrivals.

Day Trip Visitors

- The number of day trip visitors is estimated by subtracting the number of camp arrivals from the total number of visitors to Wadi Rum as can be seen in Table 11.

Table 11: Estimation of Day Trip Visitors to the Wadi Rum Cluster

| | 2002 | 2003 | 2004 | 2005 |
|---------------------------|---------------|---------------|---------------|----------------|
| Total Arrivals / Wadi Rum | 30,426 | 26,080 | 66,438 | 129,178 |
| Camp Arrivals | 2,418 | 4,912 | 10,608 | 19,059 |
| Day Trip Visitors | 28,008 | 21,168 | 55,830 | 110,119 |
| % of Total Arrivals | 92.05% | 81.17% | 84.03% | 85.25% |

- The number of **day trip visitors in 2005 is estimated at around 110 thousand persons¹⁵**.
- The percentage of daytrip visitors has been declining in recent years from around 92% in 2002 to around 85% in 2005. This is due to the remarkable increase in the number of stay over visitors, which increased from around 2,400 in 2002 to over 26,000 in 2005.
- The visitor survey revealed that only one third of visitors spend the night in Wadi Rum. On average, visitors spend 6-8 hours in Wadi Rum. The survey did not capture sufficient data for overnight visitors.

¹⁵ This number is also not accurate given that the number of campers inside the protected area is not available.

Average Spending

Overnight Visitor Spending Estimates

The cost of camping per night is estimated at JD35 for foreigners and JD25 for Jordanians¹⁶. This rate includes a jeep ride, dinner, camping, and breakfast. Foreigners comprise 80% of campers.

Specialized programs for adventurers, such as hikers, cost around JD50 per night. The latter includes transportation, tour guide, hiking program, and meals. Hikers comprise around 8% of total campers in Wadi Rum according to the surveyed camp owners, and spend an average of 7 days.

Therefore, since the average length of stay of an overnight tourist is estimated at 1.34 days, it can be safely assumed that foreign campers **spend an average of JD46.9 per person on accommodation per total stay**¹⁷. This rate goes down to JD33.5 for Jordanians.

Same-Day Visitor Spending Estimates

Same-day visitor spending is primarily on vehicle tours that can be arranged at the Visitor Center. The cost of the tours is listed in Table 12 below. The visitor survey estimated the average time of day visit to range between 6-8 hours.

Table 12: Cost of Vehicle Tours from the Visitor Center

| Destination | Km | Max Time (hours) | Price (JD) |
|---|----|------------------|------------|
| Lawrence Spring (via Nabataen Temple, Rum Village) | 14 | 1 | 15 |
| Khazali Canyon (via Nabataen Temple, Rum Village, Lawrence spring) | 30 | 2 | 20 |
| Sunset Sites (Winter and Summer- via Rum Village Nabataen Temple, Lawrence spring, Khazali Canyon . | 35 | 2.5 | 25 |
| Sand Dunes (via Nabataen Temple, Rum Village, Lawrence spring, Khazali Canyon. | 40 | 3.5 | 30 |
| Little Bridge (via Nabataen Temple, Rum Village, Lawrence spring, Khazali Canyon . | 35 | 3 | 25 |
| Lawrence's House (via Nabataen Temple, Rum Village, Lawrence's Spring, Khazali Canyon , Little Bridge ,Anfashieh inscriptions, Sand Dunes. | 45 | 3.5 | 35 |
| Um Frouth Rock Bridge (via Nabataen Temple, Rum Village, Lawrence's Spring, Khazali Canyon , Little Bridge, Lawrence's House , Anfashieh inscriptions, Sand Dunes. | 50 | 4 | 40 |

¹⁶ Numbers obtained from calling 10 camp owners.

¹⁷ (1.34days*JD)

Economic Profile of the Wadi Rum Cluster

| Destination | Km | Max Time (hours) | Price (JD) |
|--|-----------|-------------------------|-------------------|
| Burdah Rock Bridge (via Nabataen Temple, Rum Village, Lawrence's Spring, Khazali Canyon, Little Bridge, Um Frouth Rock Bridge , Lawrence's House, Anfashieh inscriptions, Sand Dunes, the map, Sunset Sites). | 60 | 5 | 45 |
| Burrah Canyon (via Nabataen Temple, Rum Village, Lawrence's Spring , Khazali Canyon , little Bridge, Um Frouth Rock Bridge ,Burdah Bridge , Sunset Sites). | 65 | 8 | 50 |
| Day hire for customized tour | Open | 8 | 50 |
| Day hire for customized luggage | Open | 8 | 35 |

Source: ASEZA

Tourism Enterprises

- Tourism enterprises in Wadi Rum include camps and tourist restaurants.
- According to MoTA data there were five camps outside the protected area in 2005, up from two in 2002 as illustrated in Table 13. Moreover, there were two tourist restaurants located at the Visitors Center. *For details refer to Appendix 1, Refer to Table 20*
- Inside the protected area, the number of camps in 2005 was 34 according to ASEZA.

Table 13: No. of Enterprises/ Wadi Rum

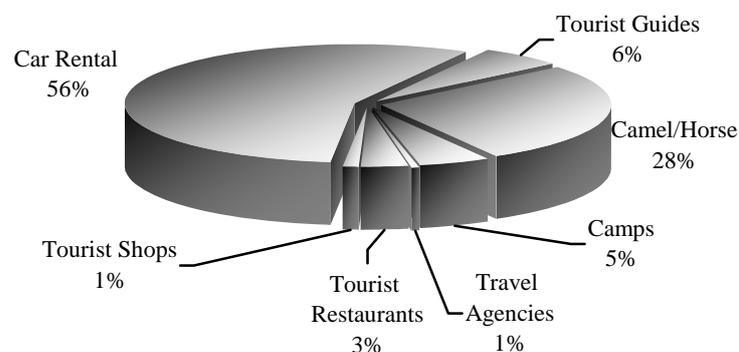
| | 2002 | 2003 | 2004 | 2005 |
|--------------------------------|------|------|------|------|
| Tourist Restaurants | 1 | 1 | 1 | 2 |
| Camps (outside protected area) | 3 | 2 | 5 | 5 |

Source: MoTA

Employment¹⁸

- In 2005, a total of 963 persons worked in the tourism field, the majority of which worked in car rental offices¹⁹. *For details refer to Appendix 1, Table 22.* The distribution of workforce in the tourism sector in Wadi Rum is indicated in chart 5 below.

Chart 16: Distribution of Employees in Tourism Enterprises, 2005



- Of the 969 employees, 933 were Jordanian (96%). Foreign employees were hired mostly by camps (20) and tourist restaurants (15).
- Data on stratification by male and female is only available for camps outside the protected area, travel agencies and restaurants. The total labor force in those establishments was 87 in 2005, of which 2 were females, one Jordanian and one foreign. *For details refer to Appendix 1, Table 22.*

¹⁸ This data does not capture employment in camps inside the protected areas.

¹⁹ Individually-owned, one-vehicle operations specialized in jeep ride rentals.

Market Size

Market size is obtained by multiplying the number of visitors by the amount they spend.

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 (NTS) (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

The number of tourist arrivals is largely affected by external factors, and subsequently has exhibited an inconsistent growth pattern during the past four years as can be seen in Table 13. The number of arrivals to Wadi Rum dropped in 2003, and then witnessed a remarkable recovery in 2004, followed by another sizeable growth in 2005.

Table 13: Total Arrivals

| | 2002 | 2003 | 2004 | 2005 |
|------------------------|-------------|-------------|-------------|-------------|
| Arrivals to Wadi Rum | 30,426 | 26,080 | 66,438 | 129,178 |
| <i>Growth Rate (%)</i> | | -14% | 155% | 94% |

As such, a scientific forecasting methodology cannot be deployed to project the number of visitors to Wadi Rum over the next few years.

Subsequently, and 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 14: Projected Number of Arrivals to Wadi Rum

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|--------------|-------------|-------------|-------------|-------------|-------------|-------------|
| High Case | 129,178 | 142,096 | 156,305 | 171,936 | 189,130 | 208,042 |
| Average Case | 129,178 | 138,466 | 148,422 | 159,093 | 170,532 | 182,793 |
| Low Case | 129,178 | 135,637 | 142,419 | 149,540 | 157,017 | 164,867 |

The number of visitors to Wadi Rum is expected to range between 165,000 to around 208,000 by the year 2010.

In 2005, the number of overnight campers inside the protected area was estimated at 19,059 persons. Using the same projection assumptions, the number of overnight campers is anticipated to range between 24,000 and 31,000 as illustrated in Table 15.

Table 15: Projected Number of Overnight Campers to Wadi Rum

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|--------------|-------------|-------------|-------------|-------------|-------------|-------------|
| High Case | 19,059 | 20,965 | 23,061 | 25,368 | 27,904 | 30,695 |
| Average Case | 19,059 | 20,429 | 21,898 | 23,473 | 25,160 | 26,969 |
| Low Case | 19,059 | 20,012 | 21,013 | 22,063 | 23,166 | 24,325 |

Forecasting Tourist Spending

In 2005, the number of overnight campers reached 19,059 persons, of which 1,661 were Jordanian. The total spending of an overnight Jordanian and foreign camper is calculated in table 16 below:

Table 16: Total Spending of Overnight Visitor

| | Overnight Campers | Average Stay (days) | Total Nights | Average Spending per Night (JD) | Average Spending per Stay (JD) | Total Overnight Spending (JD) |
|--------------|--------------------------|----------------------------|---------------------|--|---------------------------------------|--------------------------------------|
| | (1) | (2) | (1)*(2) (3) | (4) | (2)*(4) (5) | (3)*(5) (6) |
| Jordanian | 1,661 | 1.34 | 2,225.7 | 25 | 33.5 | 74,561 |
| Foreign | 17,398 | 1.34 | 23,313.3 | 35 | 46.9 | 1,093,394 |
| Total | | | | | | 1,167,955 |

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 17: Projected Spending per Overnight Tourist in Wadi Rum

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|--------------|-------------|-------------|-------------|-------------|-------------|-------------|
| High Case | 1,167,955 | 1,249,712 | 1,337,192 | 1,430,795 | 1,530,951 | 1,638,117 |
| Average Case | 1167955 | 1,233,244 | 1,302,182 | 1,374,974 | 1,451,835 | 1,532,993 |
| Low Case | 1167955 | 1,202,994 | 1,239,083 | 1,276,256 | 1,314,544 | 1,353,980 |

Spending of overnight visitors to Wadi Rum is expected to range between JD1.35-1.64 million by the year 2010.

Areas for Improvement

Based on the Visitor Survey, the tourist mentioned the following as areas in need of improvement:

- The museum is authentic but too sterile and lifeless
- Availability of bathrooms could be enhanced
- Lack of signage and explanation materials such as maps and brochures.

When prompted, visitors expanded their list to:

- Jeep rides were perceived to be dangerous and uncomfortable
- Retail and shopping is neither authentic nor original
- Length of stay was too short

The following table lists the recommendations for improvements in their order of mention by the respondents.

Table 18: Recommendations for Improvements

| <i>Top of Mind</i> | |
|--------------------|-----|
| Bathrooms | 29% |
| Signage | 25% |
| Museum | 23% |
| Explanations | 17% |
| Accommodation | 12% |
| Bedouin Experience | 9% |
| Food & Beverage | 8% |
| Rest Area | 7% |
| Entrance / Exit | 5% |
| Pathways | 3% |

| <i>Prompted</i> | |
|----------------------------|-----|
| Jeep Ride | 47% |
| Allow more time at Site | 23% |
| Cleanliness | 21% |
| Retail/Shopping | 21% |
| Camel Ride | 15% |
| Bathroom | 12% |
| Quality of Service (staff) | 11% |
| Rest Areas / Shade | 11% |
| Camp Site | 8% |
| Food Service | 5% |
| Tour Guides | 4% |
| Accessibility | 4% |
| Horse Ride | 0% |

Next Steps

- Build a reliable database system that covers visitors inside and outside the protected area. Data on visitors must be stratified by nationality, and form of travel (package, FIT, etc.). It should also provide time spent by daytime travelers, and nights spent by overnight campers. Camp owners, particularly those that arrange trips directly with the travel agents and not through the Visitor Center, must collaborate to provide this data. This should also be coordinated with MoTA.

The database should also include accurate data on tourism enterprises and employment inside and outside the protected area, in addition to jobs created by cooperatives. This information can be collected from registered camp-owners, and from the database at the Visitor Center.

- 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"²⁰.
- Track revenue/performance of cooperatives in order to measure income from tourism.

²⁰ Trip Report – Market Research Studies.

Appendix 1: Data Tables

Appendix 2: Cluster Data Availability / Collection Methodology

| INDICATOR | DESCRIPTION OF INDICATOR | REFERENCE TABLE ²¹ | AVAILABILITY (YEARS) | SOURCE | METHOD OF DATA ACQUISITION | FILLING THE GAP |
|-----------------------------------|---|---|---|--------|----------------------------|-----------------|
| Section 1: Tourist Profile | | | | | | |
| International Tourists | An international tourist is a traveler from any country apart from the country visited. | Table 14: Number of Tourists by Nationality/ Rum. Tables 15-18: Number of Tourists by Nationality and Months (2002-2005) | Available from 2002 to 2005. | MoTA | - | - |
| Domestic Tourists | A domestic tourist is a Jordanian citizen visiting the sites. | Table 14: Number of Tourists by Nationality/ Rum Tables 15-18: Number of Tourists by Nationality and Months (2002-2005) | Available from 2002 to 2005. | MoTA | | |
| Stay-Over Visitors | A stay over tourist 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 19: Distribution of Package Tours by Location/ Rum | Available from 2002-2005 Stay-over stats for package tourists available only for 2005. | MoTA | - | - |

²¹ Refer to Appendix 1

| INDICATOR | DESCRIPTION OF INDICATOR | REFERENCE TABLE ²¹ | AVAILABILITY (YEARS) | SOURCE | METHOD OF DATA ACQUISITION | FILLING THE GAP |
|---|--|--|--|--------|----------------------------|--|
| | | Table 23: Bed Nights/Arrivals by Hotel Classification / Wadi Rum | | | | |
| Day Visitors | 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 | - | Calculation | Subtracting the number of total arrivals from stayovers. |
| 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. ²² | Table 19: Distribution of Package Tours by Location/ Rum | Number of stay over package tourists is available for 2005 only. | MoTA | | |
| Free Independent Travelers (FIT) | A Free Independent Traveler (FIT) is an unescorted international traveler who does not buy a pre-packaged tour and usually organizes their own | | NA | | Calculation | FIT tourist can be calculated by subtracting the number of package tourists from the total number of tourists visiting Wadi Rum. |

²² <http://www.tourism.govt.nz/quicklinks/ql-glossary.html>

| INDICATOR | DESCRIPTION OF INDICATOR | REFERENCE TABLE ²¹ | AVAILABILITY (YEARS) | SOURCE | METHOD OF DATA ACQUISITION | FILLING THE GAP |
|--|---|--|---|--------|----------------------------|---|
| | travel as they go around the country. ²³ | | | | | |
| Number of tourists visiting the main archeological attractions | This is limited to Wadi Rum. | Table 14: Number of Tourists by Nationality/ Rum Tables 15-18: Number of Tourists by Nationality and Months (2002-2005) | Available from 2002 to 2005. | MoTA | | |
| <i>Section 2: Tourist Average Length of Stay and Average Spending</i> | | | | | | |
| 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 19: Distribution of Package Tours by Location/ Rum Table 23: Bed Nights/Arrivals by Hotel Classification / Wadi Rum | Average length of stay is available for overnight visitors. | MoTA | Visitor Survey | Two questions will be addressed: (1) Average hours spent by day visitors for both groups/FITs. (2) Number of nights spent by campers. |
| Average tourists spending/Value of | Total expenditures by foreign tourists based on tourist arrivals | | NA | - | Visitor Survey | (1) Surveying a sample number |

²³ <http://www.tourism.govt.nz/quicklinks/ql-glossary.html>

| INDICATOR | DESCRIPTION OF INDICATOR | REFERENCE TABLE ²¹ | AVAILABILITY (YEARS) | SOURCE | METHOD OF DATA ACQUISITION | FILLING THE GAP |
|--|--|--|--|--------|----------------------------|--|
| tourism receipts generated | and per-tourist expenditures. Estimate of average spending on the following: Lodging, food, handicrafts, others | | | | | of groups/FIT tourists to provide an estimate of their total expenditure, (2) Surveying businesses to get an estimate of tourists' spending on camping, climbing, camel riding, tour guiding, and transportation. |
| Section 3: Tourism Enterprises | | | | | | |
| Number of active tourism SMEs | Active tourism MSMEs in Wadi Rum include camping sites, and tourist transportation companies. | Table 20: No. of Enterprises/ Rum | 2002-2005 | 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 21: Camps in Rum/ 2005 Table 22: Number of Employees in Tourism Activities/ Rum | Employment level available, however, the employment type is not available. | MoTA | Visitor Survey | Within the survey, asking questions regarding the number of employees, their level of employment and to specify whether they are full time, part time, seasonal etc. |