

# JORDAN TOURISM STRATEGY

2021 TO 2025

*A Tourism Strategy That Is Fit for Purpose and Circumstance.*





“Tourism sector growth calls for bolstering public-private cooperation to enhance Jordan’s competitiveness as a popular destination in the region”.

His Majesty King Abdullah II  
January 1, 2020

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# 1. Preface

2019 was a stellar year for the Jordanian tourism industry with record numbers of visitors (5.3 million) and revenues (JD 4.1 billion), representing approximately 13% of GDP. Additionally, Petra celebrated receiving over 1 million visitors. Based on such strong growth, ambitious plans were laid for 2020 and beyond. Alas, with the spread of the COVID-19 pandemic in early 2020, these plans were derailed and Jordan, like many other countries suffered severe economic impacts in the months following the outbreak. The COVID-19 pandemic has swept the globe with lightning speed and impacted every country, with the travel & tourism sector being the hardest hit and most likely the last to recover. Every aspect of Jordan's tourism value chain (hotels, restaurants, transport, tour guides & operators, airlines etc.) ground to a sudden halt, thus threatening the very survival of the tourism establishments and those who work in them. The retort to COVID-19 required three distinct phases: Response, Recovery and Resilience.

The RESPONSE phase, was designed to protect the health of Jordanians, tourists, the tourism sector and those who work in it. The Government of Jordan and the Ministry of Tourism and Antiquities took drastic actions that included border closures, curfews and lockdowns, closures of tourism sites and businesses, development of health & safety protocols, and the training of inspection teams.

The RECOVERY phase aimed to limit damage to the economy, including those in the tourism sector by focusing on financial liquidity and employment protection. The Government of Jordan (GoJ), The Central Bank of Jordan (CJB), The Social Security Corporation (SSC), The Ministry of Tourism and Antiquities (MoTA) and Jordan Tourism Board (JTB) took several monetary and fiscal actions to support the tourism sectors such as reduction of interest rates, sales tax and service fees as well as pumping significant amounts of liquidity into the economy, the provision of soft loans and waiving fees.

The RESILIENCE phase was designed to, wherever possible, get back to pre-COVID-19 levels and build abilities to deal with the 'new normal'. It included the launch of several niche tourism products such as medical tourism and film tourism and boosting the domestic tourism segment, which proved to be very successful in the absence of international travelers. This phase also included the gradual reopening of tourism activities, the reopening of airports and quarantine cancellation for international visitors. Additionally, the launch of the Tourism Resilience Fund provided a protective layer to the tourism sector to shield it from the pandemic's impacts.

Furthermore, COVID-19 provided MoTA with the opportunity to look beyond the pandemic by introducing structural and impactful REFORMS in regulations, business re-alignment, access to Jordan, investments, governance, competitiveness and ease of doing business to empower the tourism industry to grow and flourish.

Therefore, COVID-19 and its impact made it imperative to conduct a review of the Jordan Tourism Strategy that was initially launched in January 2020, before the onset of Coronavirus pandemic. This document's contents reflect the implications of COVID-19 and the perceived way forward for the period 2021-2025. They are congruent with MoTA's strategic action plans as submitted to The Prime Ministry, the Ministry of Planning and International Cooperation (MoPIC) as well as various NGOs such as the World Bank.

See Annex A for details of the various phases relating to COVID-19.

## 2. Executive Summary

In addition to being the major contributor to the Jordanian economy, the tourism industry has the ability to provide inclusiveness to every location/segment of Jordan.

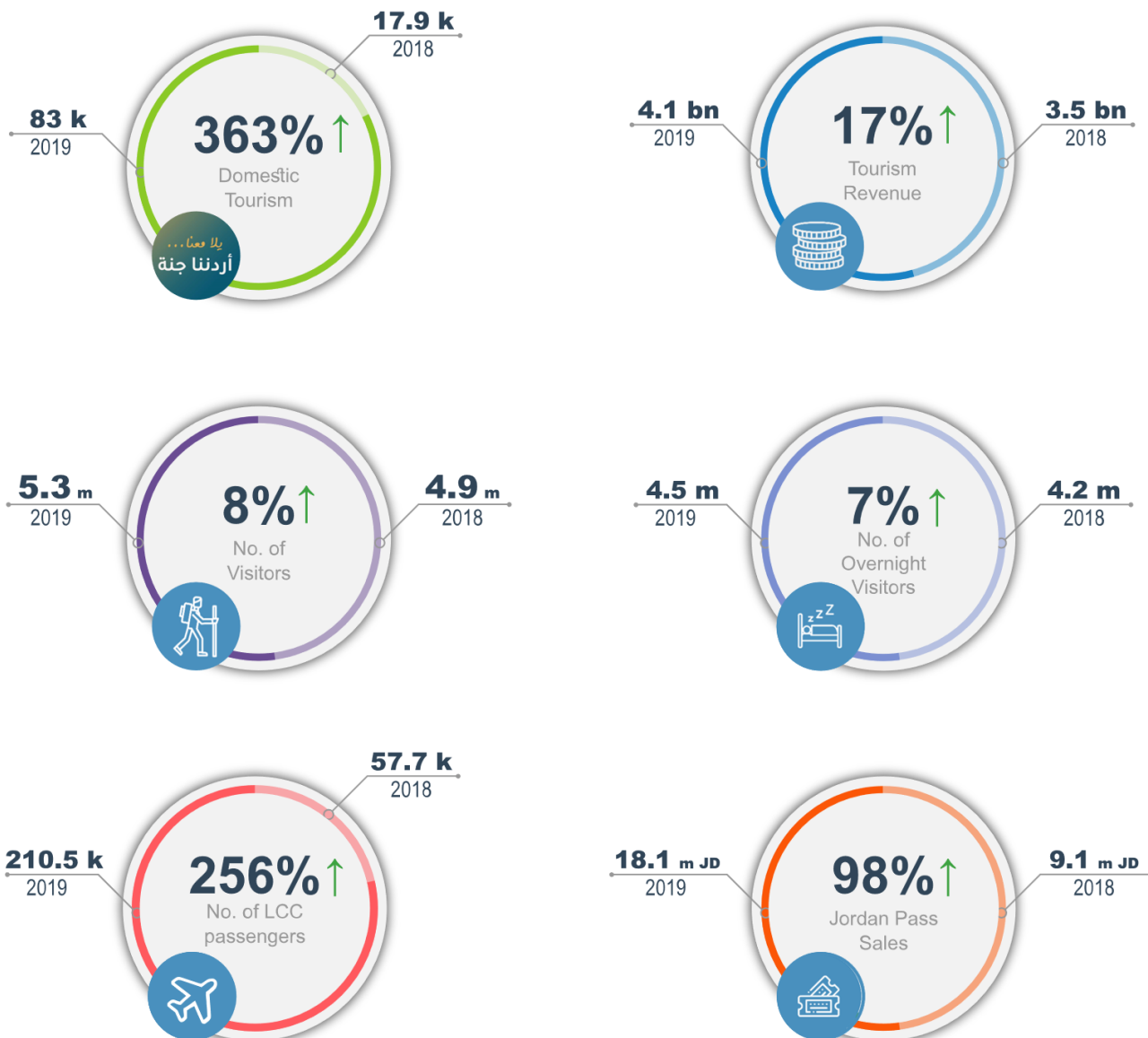
The Jordan Tourism Strategy 2021-2025 places the tourism sector at the heart of Jordan's economy and society. The Strategy addresses the challenges and gaps Jordan faces, and aligns them with the strengths and opportunities the country can build on to bolster national economic growth and job creation.

This Strategy is the result of input from stakeholders and beneficiaries, along the tourism sector value chain. It espouses a number of noble causes including the protection of Jordan's abundance of cultural heritage, development of human resources as well as the design/marketing of rich product/services/experiences. It will also tackle the needed reforms in order to rid the industry from inhibitors that are stunting growth, investments and efficiencies and thereby increase its competitiveness in the face major regional players such as Egypt, UAE, Turkey and the emergence of Kingdom of Saudi Arabia in the tourism domain.

### 3. Jordan Tourism Landscape and Performance

#### 3.1 Performance – 2019

As mentioned previously, 2019 was a record year for the Jordanian Tourism industry as can be seen from the achievements below:

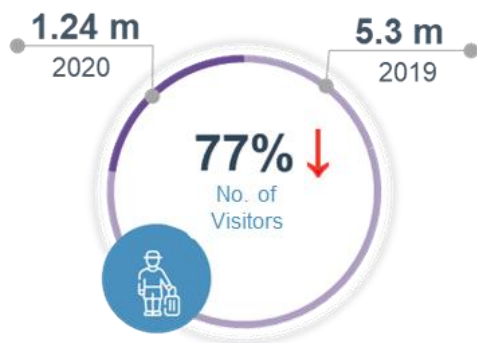
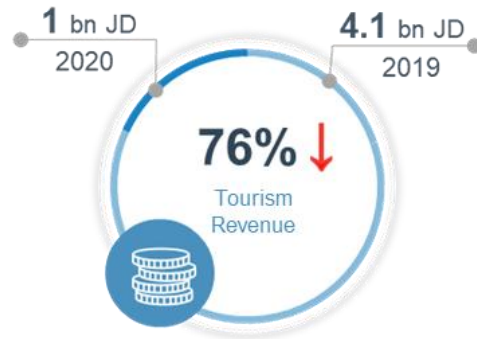


Sites that attracted the most visitors in 2019 are Petra (+37%), Jerash (+44%), Wadi Rum (+51%), Baptism Site (+29%), Madaba (+49%), and Mount Nebo (+40%).



### 3.2 Performance – 2020

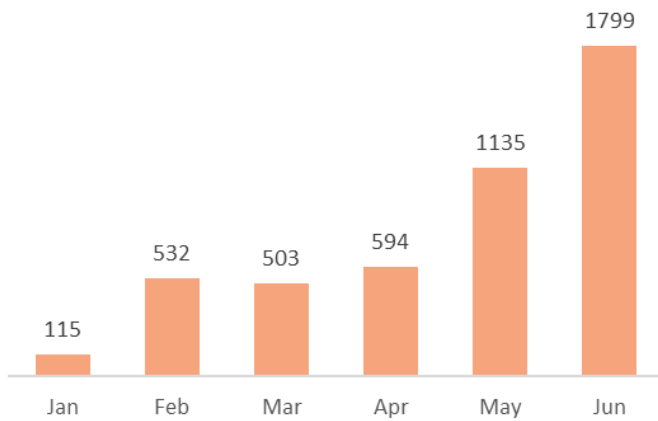
The effects of COVID-19 were most visible in 2020, which witnessed drastic decline in the performance of the Jordanian Tourism industry with most KPIs suffering a 75%+ decline.



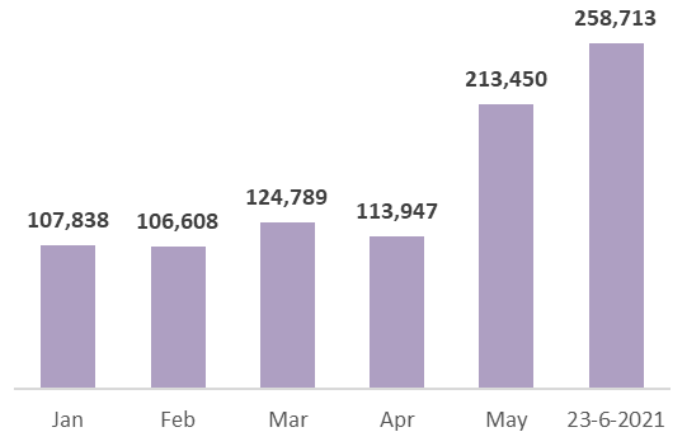
### 3.3 Performance – 2021

Some offshoots of recovery in the Tourism Industry were witnessed in the first half of 2021 as can be seen from the KPIs below

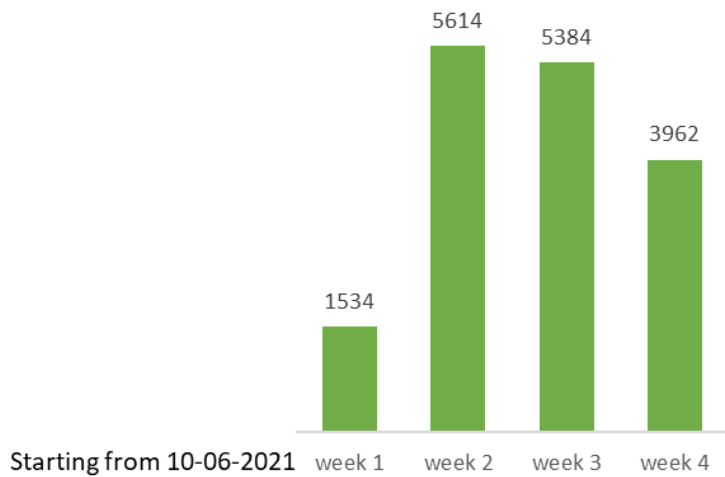
JordanPass  
Tickets



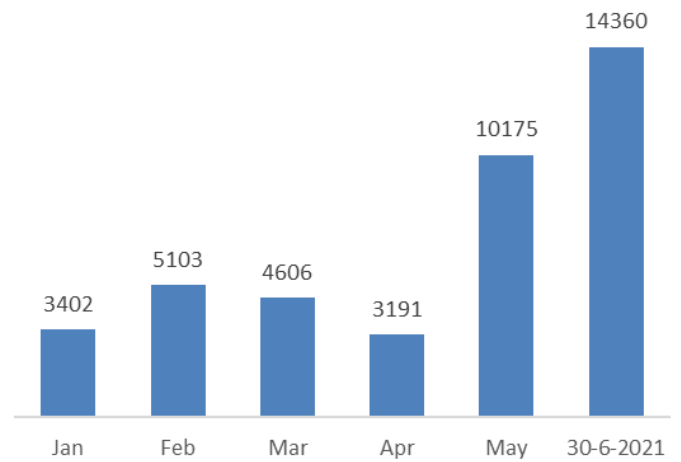
Visitors



Urdunna Jannah



Petra Visitors

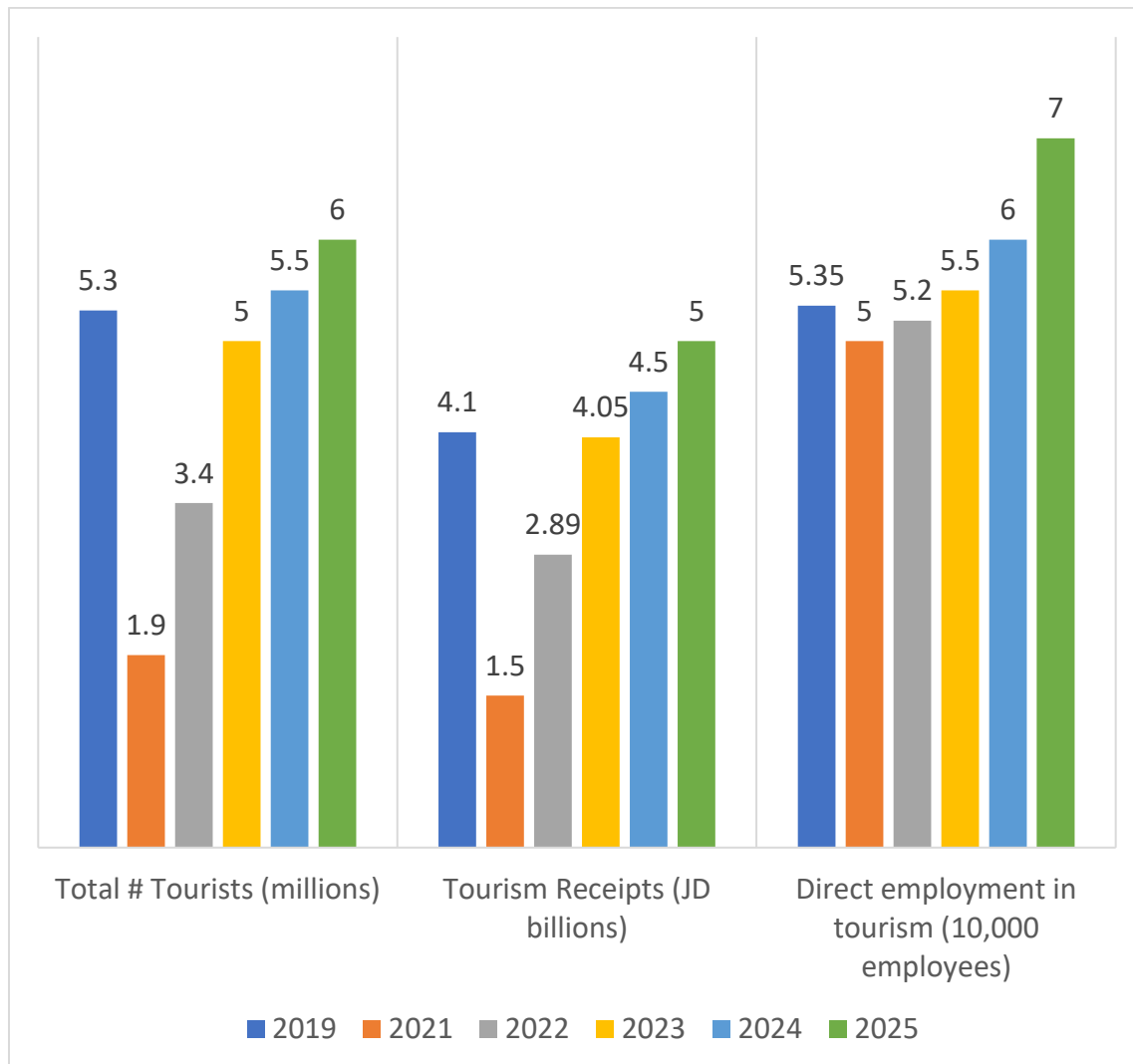




# 1. Key Performance Indicators

This strategy envisages<sup>1</sup>:

- The number of tourists to return to 2019 levels by 2024
- Total receipts to recover to 2019 levels by 2023
- Direct employment in tourism to surpass 2019 figures by 2023.



<sup>1</sup> Extrapolated from "Forecasting Study to Understand Impact of COVID-19 on Jordan's Tourism Sector" - USAID Report April 2021

## 2. Vision/Mission:

### 4.1 Vision:

“To create inclusive economic growth through authentic and sustainable tourism products & experiences and eliminate the impact of COVID-19”.

### 4.2 Mission:

We realize our vision through:

- Highlighting the uniqueness of Jordan’s history and heritage
- Development of products and experiences which exceed the expectations of international, regional and domestic tourists
- Solid partnership between the private sector and an empowered Ministry of Tourism and Antiquities
- Inclusiveness of local communities
- Preservation and protection of Jordan’s heritage and cultural sites
- Initiating meaningful reforms to accelerate investment and improve competitiveness.

## 3. Strategic Objectives:

The Jordan Tourism Strategy revolves around five major Strategic Objectives namely:

- SO.1 – Products
- SO.2 – Human Resources
- SO.3 – Marketing
- SO.4 - Heritage Protection
- SO.5 - Reforms

Further elaborations on each of the five Strategic Objectives will be outlined further in subsequent sections



### 3.1 SO.1 Product Development

There is a plethora of niche tourism products that should not be discounted as a potential source of revenue, however, The Jordan Tourism Strategy will focus on the following products:

- Culture and Heritage Tourism
- Well-being Tourism (Mind, Body & Soul)
  - Wellness
  - Medical
  - Faith
  - Adventure Tourism
- MICE Tourism (Meetings, Incentives, Conferences, Events)
- Domestic Tourism

MoTA and JTB efforts will focus on the development and promotion of these products and associated experiences.

#### 5.1.1 CULTURE AND HERITAGE TOURISM

Approximately 85% of visitors to Jordan come for culture and heritage tourism. The primary sites for this activity are Petra, Wadi Rum, the Dead Sea, the Baptism Site and Amman. MoTA/JTB, along with the private sector will aim to upgrade cultural and heritage offerings in these and others secondary locations. By adding such products to traveler itineraries, this will result in extending the length of stay and increase in expenditure.

#### 5.1.2 WELLBEING TOURISM

In Jordan's Tourism Strategy, the term 'Wellbeing' encompasses the holistic products as they relate to the health of Mind, Body and Soul.

##### A. Wellness Tourism

Wellness tourism is projected to grow globally at 7.5% annually, with 1.2 billion wellness travelers worldwide by 2030. Jordan has assets that can be developed to attract a growing number of health and wellness travelers and boasts some of the world's most spiritual assets, including its biggest natural spa at the Dead Sea. It also has sites with potential that are not yet developed or accessible, such as Bir Beita, Al Hemmeh, and Wadi Ben Hamad. The nascent yet potentially lucrative health and wellness segment requires efforts to provide comprehensive and integrated packages of products and services that attract health and wellness tourists from traditional and new markets.

## **B. Medical Tourism**

To strengthen Jordan's leading position as a medical tourism destination, a public-private council (High Health Council) has been formed to stimulate investment. The National Medical Tourism Strategy 2018-2022 is published and is aligned with Jordan's Tourism Strategy. The aim of this Strategy is for Jordan to be one of the top 5 countries globally targeted for health and wellness tourism.<sup>2</sup> Medical Tourism has suffered badly as a result of COVID-19 and hence activities will focus on reviving this sector to pre-COVID levels by 2025 – such activities will include easing of travel restrictions for restricted nationalities and facilitating easier visa requirements.

## **C. Faith-based Tourism**

The World Tourism Organization estimates that approximately 330 million tourists visit the world's key religious sites every year.<sup>3</sup> Jordan is very well positioned to develop its faith-based tourism market due to its unique position and history in the Holy Land. It hosts the primary site of the Baptism Site of Jesus Christ and Mount Nebo, Madaba, Makower, Um Qais, and Pella. Faith-based products and domestic experiences need be developed to enhance domestic tourism and attract visitors throughout the year.

## **D. Adventure Tourism**

The global adventure tourism market is projected to grow at an annual rate of 13.3% by 2026<sup>4</sup>. Adventure tourism involves travel to remote areas for unique and challenging experiences and interaction with local communities. While Jordan is well placed to embrace adventure tourism, its adventure product is in its infancy. It requires robust research and development and investment and marketing efforts to grow this potentially lucrative tourism niche product. For Jordan to become a regional destination for adventure travel, a strong private-sector-led base is required. The economic potential of adventure tourism must be assessed, and a legislative framework prepared.

### **5.1.3 MICE Tourism**

Jordan is well placed to improve its market share in the global MICE industry. With its iconic heritage sites and natural assets and necessary infrastructure, Jordan is in a strong position to attract MICE business. Jordan boasts one of the largest convention facilities in the Middle East, the King Hussein Bin Talal Convention Center at the Dead Sea. With excellent air access and global-brand hotels, Jordan has most of the necessary ingredients to enhance its competitive edge and increase its market share in the global MICE industry.

Two key elements are:

- a) Availability of high-profile conference and meeting facilities and connected infrastructure. The King Hussein Bin Talal Convention Centre at the Dead Sea is the largest convention facility in Jordan. Besides, Jordan has a wide range of convention facilities located within global-brand hotels.
- b) Jordan's iconic heritage sites and cultural experiences, which make it a compelling destination for “bleisure” travel.

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<sup>2</sup> The National Medical Tourism Strategy 2018-2022

<sup>3</sup> <https://ntaonline.com/markets/faith-travel-association>

<sup>4</sup> <https://www.alliedmarketresearch.com/adventure-tourism-market>

#### 5.1.4 Domestic Tourism

In the absence of international tourism, Domestic Tourism, in the form of Urdunna Jannah, has been a great success in keeping the various tourism establishments (Tourism Transport, Restaurants, Hotels, Tour Operators, Tour Guides) “ticking”. There was a record number of domestic tourists in 2020 (200k Vs. 83k in 2019).

Domestic Tourism will focus on areas hardest hit by COVID-19 such as Petra and Wadi Rum and will also be used as a tool to offset the impact of seasonality.

### 3.2 SO.2 Human Resources Development

The Human Resources Strategic Objective is mainly concerned with the following ambitions:

- Education and training of qualified human resources for tourism sector employment
- Increasing employment of Jordanians
- Engaging women and people with disabilities in tourism careers and jobs
- Involvement of local communities in tourism activities and businesses throughout Jordan
- Training program for MoTA/DoA/JTB/Sector staff.

### 3.3 SO.3 Marketing

This Strategic Objective will focus on the following activities:

- Enhancement and effectiveness of marketing, branding and positioning
- Minimizing the Impact seasonal and regional dispersal of international visitors
- Enhancing digital marketing
- Building resilience and the ability to bounce back after adverse events
- Enhancing travel to Jordan via Low Cost Carriers

### 3.4 SO.4 Heritage Protection

Heritage Protection is an important Strategic Objective, whose aim is to deliver:

- Site Preservation, Conservation, Consolidation, Restoration, Rehabilitation – this activity is within the remit of the Department of Antiquities (DoA)
- Site Improvement – this activity is undertaken by MoTA

Detailed action plans already exist <sup>5</sup> for the years 2021-2025 as per submission to the World Bank DLRs/DLIs program.

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<sup>5</sup> World Bank DLRs/DLIs -submission on Feb. 2021

### 3.5 SO.5 Reforms

Reforms have been identified as a key Enabler/Strategic Objective to the success of the tourism industry and will endeavor to deliver the following:

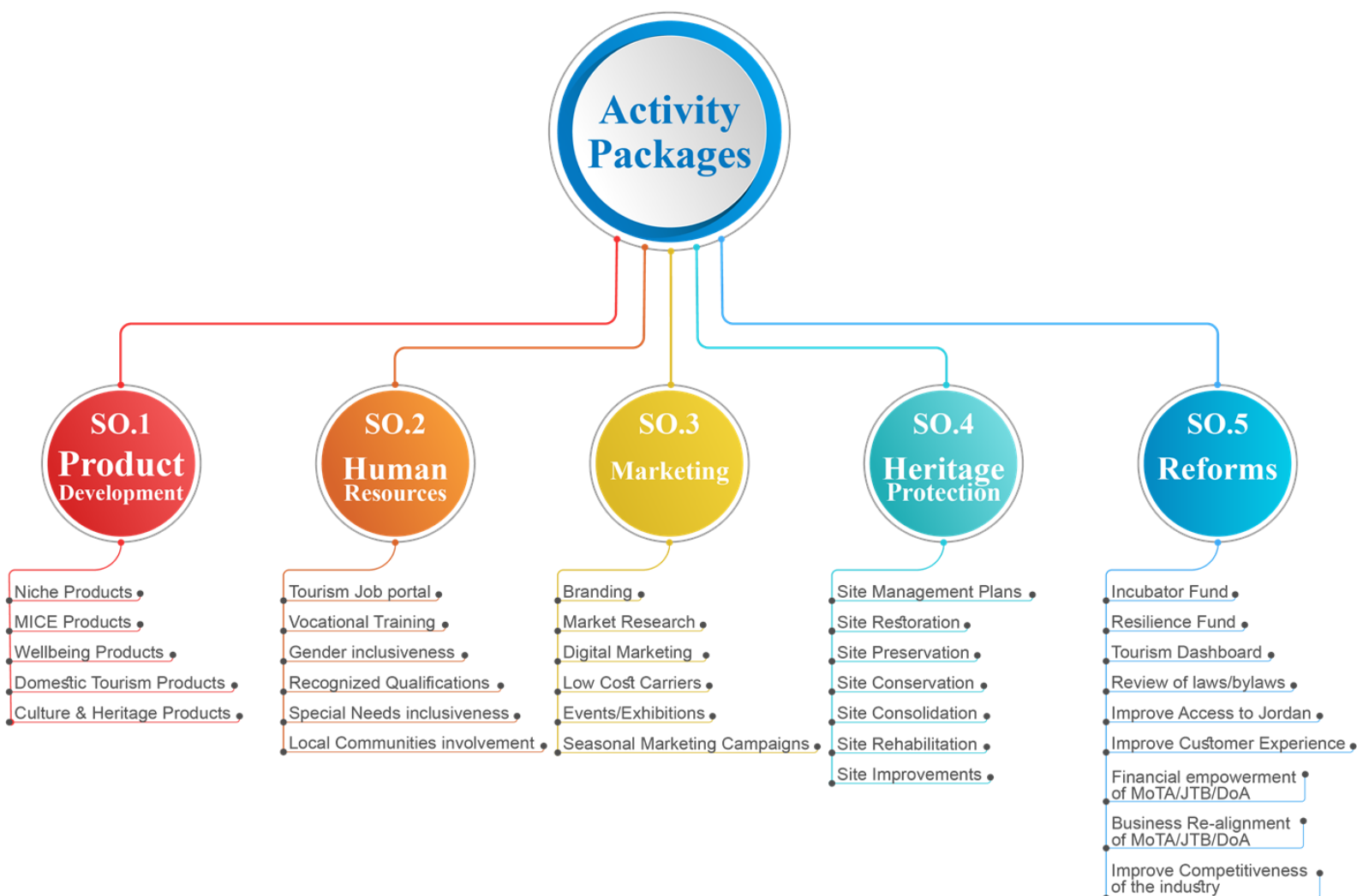
- Empowerment of MoTA/JTB/DoA through increase government funding/grants
- Review all pertinent laws/bylaws in order to remove inhibitors to investments and growth as well as reduction of operational costs to the sector
- Business realignment of MoTA/JTB and DoA organizations in order to deliver focus on core activities and synergies
- Improve access to Jordan in terms for tourists including e-visas, review of restricted nationalities etc.
- Improved customer experience for the tourist.

## 4. Strategy Execution

In order to ensure successful execution of the National Tourism Strategy, initiatives at lower levels of granularity in the form of Activity Packages and Action Plans need to be detailed and elaborated.

### 4.1 Activity Packages

Here, high level areas of activities (Activity Packages) are identified as is illustrated below:





## 4.2 Action Plans

For each of the Strategic Objectives, there may be a number of Action Plans, each of which will specify details of the action, responsibilities, timescales, KPIs etc.

Strategic Objective	Action	Leader	Target date	KPI/Comment
Heritage Protection	Site Management Plans for 5 sites/year	DoA+MoTA	Dec-25	
Heritage Protection	Site Security (CCTV/Fences/Lighting)	MoTA	Sep-25	20 sites
Heritage Protection	Site Preservation, Conservation, Consolidation, Restoration, Rehabilitation	DoA	Dec-24	(2) 2021/ (5) 2022/ (10) 2023/ (12) 2024
Heritage Protection	Nomination of 3 archaeological sites to UNESCO	DoA	Dec-24	Salt/Um Jmal/Harrah
Heritage Protection	National documentation for artifacts in archaeological Museums	DOA	Dec-25	DOJAN - 16 museums @75k each
Heritage Protection	Archaeological warehouse/Library/Labs	DOA	Dec-25	NWEIJES
Human Resources	Launch of Job Portal	MoTA/JRA	Sep-21	
Human Resources	Vaccination of sector employees	MoTA	Aug-21	Done
Human Resources	Develop 'Gender Inclusion' Action plan	MoTA	Dec-21	
Human Resources	Develop "Accessible Tourism" action plan including facilities/employment	MoTA/SSC	Oct-21	
Human Resources	Training action plan for MoTA/DoA/JTB & sector	MoTA/DoA/JTB	Dec-21	
Marketing	Launch of Kingdom of Time brand	JTB	Nov-21	# of articles produced
Marketing	Agreement with new LCCs	JTB	Dec-25	# new routes to Amman & Aqaba + # number of passengers
Marketing	Develop Jordan digital map of all tourism sites	JTB	Jun-22	
Marketing	Digital marketing campaign including global travel sites (Expedia/Trip Advisor etc.)	JTB	Dec-21	
Marketing	Targeted marketing campaign to reduce impact of seasonality	JTB	Dec-21	
Marketing	Accept vaccination certificates as alternative to PCR test(s)	MoTA	Jun-21	Done

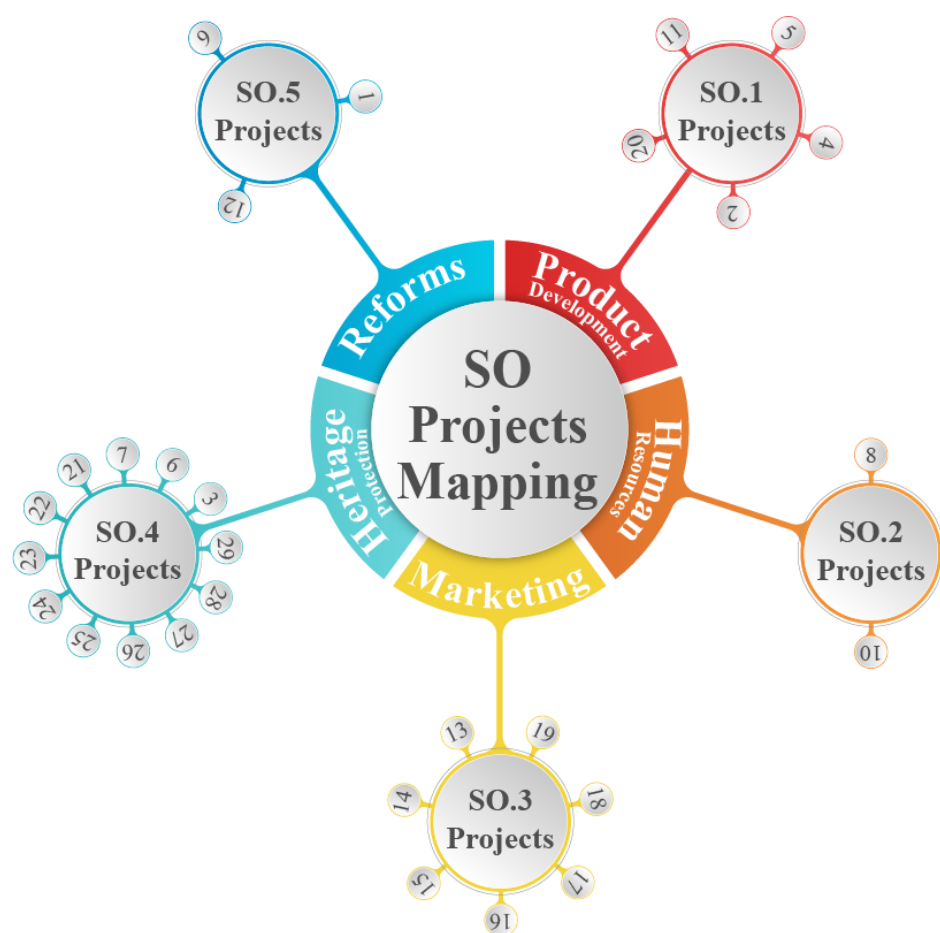
Strategic Objective	Action	Leader	Target date	KPI/Comment
Products	Launch of Urdunna Jannah	JTB	20th May 2021	250k tourists
Products	Restructure organization to include product management department	MoTA	Sep-21	Dedicated product Manager for each product
Products	Increase medical tourists to 253k by 2025 from 2020 base of 55k.	JPHA	Dec-25	158k (2021), 181k (2022), 209k (2023), 230k (2024), 253k (2025)
Products	Increase average revenue from tourist to over 1000+ JD	JTB/Tour Operators	Dec-23	
Products	Increase average stay of tourist to 5+ nights	JTB/Tour Operators	Oct-23	
Products	Launch Educational products targeting regional countries	MoTA/JTB /MoHE	Jun-22	
Products	Develop Festivals calendar that includes all governorates	JTB	Jan-22	
Products	Review/Amend Jordan Pass	MoTA	Oct-21	
Reform	Review 5 bylaws to remove obstacles of doing business	MoTA	Sep-22	
Reform	Operational launch of Resilience Fund	JTB	Aug-21	
Reform	Create an investment & community empowerment directorate	MoTA	Sep-21	
Reform	Launch 5 million JD Tourism incubator fund	MoTA	Mar-22	
Reform	Develop Tourism MIS/Dashboard	MoTA	Oct-21	
Reform	Develop customer satisfaction system @ sites	MoTA	Mar-22	
Reform	Conduct Social & Environmental impact study on Jordan Tourism Strategy	MoTA/UNDP	Nov-21	
Reform	Digitization of all MoTA services	MoTA	Jul-23	
Reform	Establish Jordan Chamber of Tourism	MoTA	Jun-22	
Reform	Establish research/analytics department	MoTA	Sep-21	Done -May 2021
Reform	Unification/Reduction of electricity tariffs	MoTA	Dec-21	
Reform	Re-constitute/re-activate National Tourism Council	MoTA	Aug-21	
Reform	Petra Resilience Fund	MoTA/PDTRA	Sep-21	1 million JD
Reform	e-Vises + Review Restricted Nationality	MoTA/JTB/MoI	Oct-21	

### 4.3 Project Management Office (PMO)

The MoTA Project Management Office supervise the execution of the action plans by supporting those responsible with the planning, execution, monitoring and reporting activities.

### 4.4 Strategy Alignment with Executive Plans

The National Tourism Strategy is consistent with existing executive 3 & 5 year plans as submitted to the Prime Ministry & MoPIC as well those agreed with other entities such as The World Bank, USAID, EBRD etc. The mapping below shows the consistency of the Strategic Objectives of the Jordan Tourism Strategy and the projects as submitted to the Prime Ministry and MoPIC.

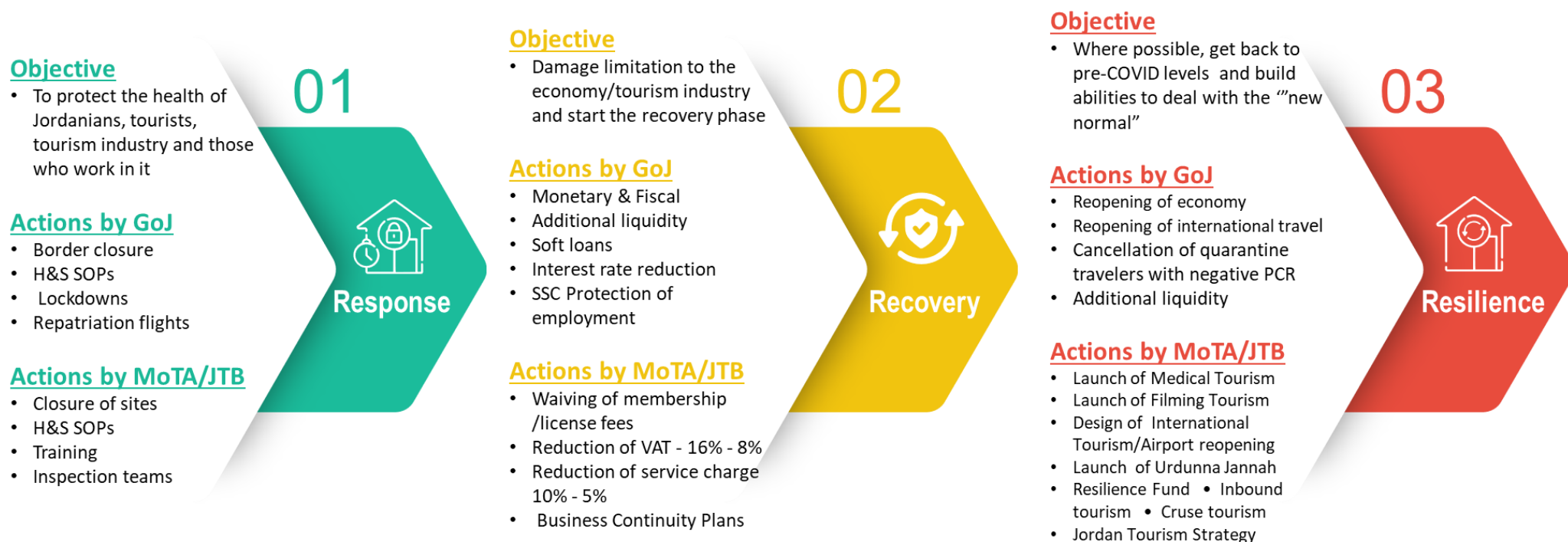


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## 5. Acronyms

ASEZA	Aqaba Special Economic Zone Authority
DoA	Department of Antiquities
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GOJ	Government of Jordan
ICT	Information and Communications Technology
IP	Implementing Partner
JHA	Jordan Hotel Association
JIC	Jordan Investment Commission
JITOA	Jordan Inbound Tour Operators Association
JD	Jordanian Dinar
JTB	Jordan Tourism Board
KII	Key Informant Interview
KSA	Kingdom of Saudi Arabia
LCC	Low-Cost Carrier
LDI	Local Direct Investment
M&E	Monitoring and Evaluation
MoPIC	Ministry of Planning and International Cooperation
MOTA	Ministry of Tourism and Antiquities
MOU	Memorandum of Understanding
PDTRA	Petra Development & Tourism Regional Authority
PMO	Project Management Office
PPP	Public-Private Partnerships
RJ	Royal Jordanian Airlines
RSCN	Royal Society for the Conservation of Nature
SDGs	UN Sustainable Development Goals
SMART	Specific Measurable Attainable Relevant Timely
MSME	Micro Small and Medium-sized Enterprise
SWOT	Strengths Weaknesses Opportunities Threats
TCI / TSA	Tourism Competitiveness Index /Tourism Satellite Accounts
UNWTO	United Nations World Tourism Organization
WEF	World Economic Forum
WTTC	World Travel Tourism Council

# Annex A



## 04 Reforms



### Access to Jordan

- Vaccination Certificates
- Low cost airlines
- Cruises
- e-visas/restricted visa
- Marka Airport (landing fees)
- Expand variety /reach /duration of Domestic Tourism
- Expansion of Tourism Product Portfolio



### Site Improvements

- Site/Services improvement plans
- Site Management
- Heritage Protection
- Training to Visitors-facing employees
- Digitization
- Free Wi-fi access at sites
- Free toll number for tourist for complaints



### Legislation

- Review all regulations to improve performance of tourism sector
- Remove hurdles



### Inclusiveness

- Full participation by private sector
- Local communities
- Skilling/Up-skilling & re-skilling
- Gender inclusion
- Disability inclusion



### Competitiveness

- Reduce burden of doing business in tourism sector
  - Reduction/unification of electricity tariffs
  - Waiving of membership /license fees
  - Expand the use of Renewable energy



### Financial

- Tax Reform
- Incubator & Resilience funds
- E-E Investor Experience: Encourage investments/growth