UNIVERSITÀ DEGLI STUDI DI NAPOLI FEDERICO II

The Jordanian National Tourism System

A thesis submitted in partial fulfilment of the

requirements of Naples University of Federico II

for the degree of Doctor of Philosophy

in

Tourism Management

Submitted by

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Under the supervision

Of

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And

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Naples, in 30 November 2009

To my father's soul

To my mother, my brothers and sisters

To my Arabic Nation

Summary

The study of National Tourism System in Jordan aims to shed some light on the structure of tourism industry in Jordan by illustrating the real resources present in the country, assessing the quality of services, and then exploring the management efficiency, ie. Governance dimension.

The work has been based on the structure provided by the Resource-based Theory (RBT) which gives a significant weight to the existed resources in the territory and considers them as an important factor for the development of the product. Moreover RBT draws a connection between the various components in the area and the evolution and sustainability of tourism product.

The author used the Resource-Service-Governance framework to show the relationship between these three elements in order to understand to how extent they affect the final product and its image. Five Jordanian tourist destinations were chosen, for this purpose, as a research field. That was useful to portray the reality of the Jordanian product, and to give a holistic idea about the local tourism systems adopted in these destinations.

It is quite clear that the first dimension of the framework (Resources) represents the cornerstone from which to launch any tourist destination by exploiting these resources that can attract both tourists and investors.

The analysis of tourism resources in Jordan is considered necessary before putting into place any global master plan for development. Moreover, exploring the nature of resources in Jordan leads us to put in order our priorities of work, focusing on the economic projects and programmes that can generate rapid and sustainable economic results.

The second dimension (services) also has a crucial role in the life of the tourist destination. Indeed, a destination with poor tourist facilities (accessibility, accommodation, food and beverage services, and entertainment) will not be able to attract the numbers of tourists that it deserves even if it is rich in resources.

The third dimension of the framework is Governance, and here we highlight the impact of policies and strategies adopted by both the public and private sectors to develop the

tourism industry in the country. The form of the role played by governance is extremely crucial and significant in the development of tourist sites. In most cases, this role is assumed by government bodies, politicians, and decision makers who undertake practical procedures to realise their visions.

Moreover, the concept of "Governance" sheds some light on the managerial aspects of the tourist destination, the degree of coordination between the various stakeholders, and the role given to those stakeholders in terms of the policies and strategy making. Indeed, many countries, especially the developing ones, have started to involve the private sector more in the planning process since it has became an important partner on the development path. Jordan, for example, has launched a great initiative that aims to bridge the gap between the private and public sector, and to build an integrative relationship between them instead of a hostile and unfriendly one.

The author attempted to demonstrate several aspects of the Jordanian products such as; evolution of tourist sites, the competitiveness of Jordan as a tourist destination, quality of tourism services, the impact of the transport sector on the performance of Jordanian tourism system, price-quality relationship in the Jordanian product, relationship between private and public sector, decision making process, relationship between various public bodies and private sector, the role of private sector in the enactment of regulations and laws, the role of private sector in the promotion of product, and finally the efficiency of tourism statistical system and its impact on the availability of tourist database in Jordan.

Acknowledgment

I would like to express my deep acknowledgment to all those who helped me to fulfill this work. For my supervisor Prof. Sergio Sciarelli –Coordinator of Tourism PhD program-, who was always available, and whose suggestions and remarks were helpful to orientate me to choose the path that should be followed in my research. He gave an infinite support during my stay at the university and was dealing me as a son more than a student. I am so grateful and thankful for his generous support. My thanks go also to my co-supervisor Prof. Valentina Della Corte- Assistant professor at the Department of Business Administration- for her appreciated suggestions; she contributed significantly in setting up my research plan.

My thanks go also to professors of Business Administration department, especially to Prof. Mauro Sciarelli and Prof. Roberto Vona who were always close to me.

I am grateful to Prof. Mike Robinson, Director of Centre for Tourism and Cultural Change-Leeds Metropolitan University, and Prof. Philip Long, Associate Professor at CTCC, for receiving me as a visiting scholar. My gratitude also goes to my close friend Suleiman Farajat, PhD candidate at CTCC; for his warm friendship and infinite support during my stay in Leeds.

I thank also all of my friends in the department, especially Mario Tani with whom I have succeeded to build a strong friendship that hope it will last, he was very kind to me and he never spared any efforts to help me when I was need.

Many thanks, also, to my friends Miss Carol Ferndale and Miss Ghada Mahmoud, for their appreciated help by reading the text and giving suggestions to correct any grammatical mistakes.

I express also my gratitude and acknowledgment to all the administrative staff at Naples University –Federico II, in particular Mr. D'Oriano for PhD Students' Office, department secretary staff, library staff, and bar staff for their kindness and warm friendship.

I am grateful for the Naples University –Federico II for giving me a scholarship to pursue my PhD study, without which it was so hard to continue.

Special thanks also go the head of Statistics Department at the Ministry of Tourism (Mr. Fayyad Alsukkar), to the head of Research Department at Jordan Tourism Board, to Petra Region Authority Staff, to ASEZA staff, Madaba visitors centre, Main Library of Jordan University, Alhussein Bin Talal University, Centre for Tourism and Cultural Change (Leeds-UK), Jordan Central Bank, Directorate of Statistics, Jordan Investment Board.

I thank all people that I met during the field work on my study, to the tourists who filled out the questionnaires, to the interviewed people whether from public institutions or private firms.

I thank all of family members, my friends around world for their ultimate support for me during my study.

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Preface

Tourism has become an important sector of the economy to the extent that it identifies the level of economic development of a country, a fact which has motivated many scholars to study this sector in an attempt to explore the various aspects of it that determine the form and dimensions of this growing phenomenon. However, the relative importance of tourism varies from country to country according to the nature of the economic system in each country and according to the level of dependency of the national income on tourism, and the local income generated by this sector.

In Jordan, a small Mediterranean country, tourism has started to see a very rapid growth since the 1990's, especially since the signing of the Jordanian–Israeli peace treaty of 1994, (known as the Wadi Araba Treaty), and also as a result of the Jordanian government becoming more aware of the pivotal role of tourism in economic development plans. Thus, it has urged businessmen and investors to get involved in the Jordanian tourism industry, and actually many of them have responded positively to this request and invested their money in various Jordanian tourist destinations such as Amman, Petra, the Dead Sea, and Aqaba.

This late interest from the government in the tourism sector was related to the lack of stability in the Middle East region and the political crises that frequently emerged during the era before the signing of the peace treaty. This situation also affected academic research and studies on tourism, and kept them limited to certain topics such as the archaeological, historical, and cultural aspects of Jordanian sites, without giving the same interest to tourism. These studies also discussed the political forms and structures of states and empires that had governed Jordan in various periods, (Jordan is a recent term - previously the territory was part of Syria and known as Bilad Alsham). The vital role of the ancient sites in the tourism industry was also neglected, yet these can play an important role in generating significant returns for the national economy as well as for the local community.

In fact, a lack of research into this sector posed a serious obstacle to the tourism sector development process, particularly because such studies can contribute actively to the identification of priorities for the development of the tourism industry, and the needs that urgently have to be satisfied in order to build an integrated and complete tourism product that can penetrate the international markets around the world. Indeed, those needs provided exactly the motivation that pushed many of the Jordanian universities and institutes to study this phenomenon, and to conduct research and academic programmes that cover tourism topic areas such tourism management, cultural tourism, heritage tourism, economic dimensions of tourist activities, environmental and social impacts of tourism, and various other tourism related topics.

Here it is important to point out that some neighbouring countries in the Middle East and North Africa Region (MENA) were more aware of the value of tourism than Jordan. For example, Tunisia, Egypt, and Lebanon had worked much earlier on the tourism sector building process, and put various strategies and plans into action that made their product more competitive on the international markets. These strategies obviously caused tourism in these countries to be considered as one of the main economic pillars of national progress and development, and were seen also as an intelligent choice to enhance the balance of payments and earnings from foreign exchange.

By doing this study on the Jordanian tourism system, I am actually trying to explore new scientific areas and to contribute to the efforts made by other Jordanian and non-Jordanian scholars who have studied tourism and its impact. I also hope that this study will open up the discussion on what would be the best techniques to be adopted by public bodies and private firms in order to improve the tourism sector performance in a way that will make it compatible with market trends and tourist needs.

In fact, it was my home city of Petra that gave me the inspiration to look into such a field, because although it possesses very rare and rich treasures, it still lacks the capacity to reveal its true value to the world, even after the nomination of Petra as one of New Seven Wonders of the World in 2007. However, this situation is also related to the limited amount of tourism research conducted on this area, and the fragmented coordination between the several bodies working in the city.

In addition, it was the dual role of tourism that caught my interest: tourism not only has a very important influence on the economic performance of a country due to the fact that it can attract investment, create new job opportunities, and increase government income in the form of taxes, and so on, but also tourism is a very good way of enhancing the dialogue between different cultures, and encouraging mutual respect and understanding, due to the opportunities for encounter that tourism offers both to tourists and to locals, allowing both groups to break down barriers that may have built up as a result of stereotypes and prejudices.

It is important to have a comprehensive profile of all Jordanian tourist destinations in which each component could be identified and categorised. In this way we can have a clear vision of the Jordanian product which we can then use to build an overall plan.

Such a profile should avoid the archaeological descriptive method usually used in the past to present our Jordanian product, and instead of that should categorise the destination resources, whether natural or man made, and classify all the tourism-related services at each destination, to measure how adequate these services are. Moreover, it is necessary to conduct a periodical analysis of these destinations in a similar manner to that adopted in some of the neighbouring countries that are considered to be distinctive destinations.

In fact, in the 1990's many academic institutes and universities, both public and private, started to pay more attention to the tourism sector, thus academic programmes in topics such as tourism management, hotel management, and heritage preservation have been opened to Jordanian young people who have been encouraged and motivated to enrol in them. Of course this progress gives us more confidence that some change in how we look at the tourism industry in Jordan is going to be realised.

The Jordanian National Tourism System

Chapter One

Introduction

1.1. Study problem :

Nowadays, tourism is considered to be one of the most rapidly growing sectors of the economy, and one which exerts a strong influence on the development of both industrialised and Third World countries. There have been many significant changes in tourism and travel throughout recent history, from seeing tourism as a way to travel to another place to have adventures and learn about other cultures and communities, to achieve religious and commercial goals during the ancient and medieval periods, and more recently travel has served the purpose of satisfying various motivations and needs which vary over time due to changes in lifestyle, the progress of human quality of life, and the improvement of economic conditions in many communities[1]. This progress has developed new concepts for the tourism industry dictionary such as "recreational tourism", "summer tourism", "beach tourism", "conference tourism", "cultural tourism", "archaeological tourism", "historical tourism", "natural tourism", "sporting tourism", and "curative tourism"[2].

The increasing number of tourists has made tourism a real engine for development and an efficient tool for gaining prosperity for many countries. According to the statistics, in the 1990's tourism contributed 6% to the world economy, and created over 200 million jobs, while tourist expenditure represented more than 11% of total global consumption, and the share of tourism out of total investments exceeded 10.7% on the world level[3].

In 1998, the economic receipts generated by the tourism industry reached 4.4 trillion dollars, and job opportunities created by tourism were over 231 million. Moreover, tourism contributed 11.6% to the international Gross Domestic Product, and the capital

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[1]) Burkart, A.J. and S. Medlik; Tourism: Past, Present, and Future; Heinemann professional publishing; 2nd edition; London; 1988; p. 3-37.

[2] Dr. Aldhaher Na'eem and Sarab Elias, Tourism principles "Mabadi' Assiyaha"; Dar Almaseera publications; (Tourism and Hotel Industry series); 1st edition; Amman; 2001; p. 11-28.

[3] WTTC (World Travel and Tourism Council); WTTC Report ; 1993

expenditure of both public and private sectors related to tourism was around 779 billion dollars[1].

Tourism receipts rose to 733 billion dollars in 2006, and the number of tourists reached 846 million, (about 43 million more tourists compared to the previous year), corresponding to a growth rate of 5.4% with respect to the previous year[2].

Although there were some problems with the world economy in 2007, the tourism industry continued to grow for a fourth year. The annual growth percentage reached by the tourism sector was around 4% in real terms, ie: tourism grew faster than other economic sectors, and was able to offer over 34 million new job opportunities in the same period.

By the 2008, international arrivals reached 924 million, up by 16 million compared with 2007. Tourism then slowed down slightly due to the financial crisis and oil price rises which undermined consumer confidence.

In Jordan, tourism was somewhat neglected for a long time. Indeed several Jordanian governments were interested only in developing tourism as a secondary sector of the economy, due to complicated internal problems related to instability, and the various economic crises that Jordan was facing at that time.

In addition, Jordan had other problems related to the Arab-Israeli conflict, and other conflicts emerged in many countries of that region, specifically the First, Second and Third Gulf Wars.

After the signing of the peace treaty known as the Wadi Arab Treaty in 1994 with the Israelis, the number of tourists visiting Jordan grew by 62.1% between 1993 and 1998. This remarkable growth was no doubt partly due to the opening of the Wadi Araba crossing on Jordan's southern border with Israel, and the Sheikh Hussein crossing on the northern border with Israel, these crossings giving tourists the opportunity to take advantage of this joint venture. It became relatively easy then for tour operators and

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[1] *Beltaji, Aqel; Jordanian Tourism Strategy for twenty first century " Istratejiat asyiaha alurdenia ala abwab algaren el 21"; Jordanian Center for Economic Development (New Jordan Center for Studies), Dare Alsindbad publication; Amman; 2000; p. 19-20*

[2] *WTO (World Tourism Organization); WTO, Tourism Highlights, 2007 edition, p. 2.*

travel agencies to organise trips across the border into Jordan, especially all-inclusive tour packages that combined a number of these Middle Eastern countries, where just a few years previously it had not been possible to cross the borders. Although there was significant growth in the number of international tourist arrivals during that period, the bed occupancy rate increased only by 1%. The reason was that many tour operators and travel agencies were using Jordan, especially Petra, in their packages to attract tourists to visit Israel by offering a complete package spent entirely in Israel, but including a one day visit to Petra. Thus, tourists were crossing borders, in particular the southern Wadi Araba crossing, between Jordan and Israel, every morning in order to visit Petra, and sometimes also Jerash and Amman, but after spending the day there, they were travelling back to Israel over the same border crossing. These day tourists crossing the southern border to visit Petra accounted for around 47% of the total number of tourists visiting Jordan during the same period. In fact, many Jordanians complained about this because they were not reaping any real benefit from this day tourism[1].

However, since then, tourism has become a vital sector for the Jordanian economy, as it was ranked to be the first export sector, and the second most important private sector with respect to job creation and foreign exchange earnings in 2003, contributing over 800 million dollars to the Jordanian economy, which corresponds to 10% of GDP[2].

Although the increasing numbers of tourist arrivals to Jordan during the last two decades compares well with previous years, many public officials at the Ministry of Tourism and Antiquities (MOTA) and other experts agree that the tourism sector in Jordan has still not achieved the potential that it could do, particularly given the fact that Jordan has some of the most unique and rich landscape and heritage, which makes it a very competitive destination over the rest of the Middle Eastern region. Statistics show that tourism made up 10% of the Jordanian GDP in 2005, which is lower than the global average of 10.5%-12.4%.

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[1] *Naseem Baraham, Petra: the Core of Jordan Tourist Product; a paper presented in the Tourism in Jordan: Challenges and Visions Conference held on 22nd November 2000; Amman; 2001; p.15-16*

[2] *Jordan National Tourism Strategy 2004-2010; Ministry of Tourism and Antiquities (The study was made by support of AMIR programme), Amman; 2004; p.3*

The scarcity of natural resources, whether agricultural, mineral, or water resources on the one hand, and the abundance of tourism-related resources on the other, mean that tourism has tended to be the main topic discussed at conferences and seminars in recent years, and also that it is starting to be seen as the driving force of economic development[1].

In fact, Jordan, as is the case with many other countries of the Third World, could not create an integrated system to enhance a single economic sector such as tourism due to lack of funds. According to many academics and experts, it was this situation that forced these countries to create new models by which they could bring tourism and other sectors together in a development plan like the Multi-linear Model. So, the development of tourism can be set as a specific target, but governments usually adopt general strategies and plans that indirectly include the tourism sector[2].

It is necessary to study all the components of the product, such as attractions, transport services, food and beverage services, accommodation, infrastructure, and so on, and to analyse the quality of these elements (price-quality base), comparing them to the tourism products of the other countries of the Middle East region. By exploring tourist needs and expectations we can understand both the strong and the weak aspects of the Jordanian tourism product.

Studying all the above mentioned resources of which the product is composed, it is necessary to understand the links between these resources and the competitiveness of Jordan as a tourist destination, and to what extent Jordan can keep its position in the face of the challenges and strong competition from the worldwide tourism market.

Identifying the nature of the resources on which competitiveness is based represents the starting point of the product building process, and evaluating these contributes greatly to the adoption of suitable long term strategies and short policies and plans required to deal with the input and output of the product, and helps to answer some of the questions such

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[1] *Ministry of Tourism and Antiquities (MOTA), MOTA achievements; annual report issued by the ministry; Amman; 2005; p.17*

[2] *Janke; A.C.; Jordan and Tourism: Tourism as development, an article written in Jordan and Tourism "Alurdon wa assyiaha"; Yarmouk University; 1997; Irbid; p.62-67*

as the nature of the results and whether they are temporary or permanent, (sustainability of development)[1].

Resources can be classified in terms of their availability, from free resources which are easily accessible, to scarce resources which are difficult to get hold of for a variety of reasons, such as their being limited, meaning that there is competition to get hold of them, or because certain barriers exist that prevent access to these resources[2].

Identifying the Jordanian tourism-related resources helps to identify the characteristics of these resources, what it is that distinguishes them from the resources of other tourist destinations, how they can be used in the tourism industry, how much it will cost to realise projects relating to these resources, and whether it is feasible to exploit them or not.

Having specified and analysed such resources, we can then move on to analyse another important element of the tourism product that is represented by services. Indeed, any tourist attraction cannot promote itself solely in terms of the natural, cultural, and archaeological resources that it possesses, but it must also have an integrated services system that will offer all the necessary services to visitors, such as accommodation, transport, restaurants, travel agencies, and the like, otherwise the destination will not be competitive or attractive for tourists.

Eventually, the Tourist Destination concept has evolved, with its two components being resources and services, according to the changes and challenges that a tourist destination faces. Some researchers in the field, such as Gunn (1994), used the concept of the Travel Market Area to refer to the tourist location or attraction created and developed in order to be promoted in the international tourist markets according to tourism product strategies and policies[3]*. Meanwhile Medlik (1993) considered the tourist*

[1] *Barney, J.B.; Valentina Della Corte; and Mauro Sciarelli; Strategic management research at crossroads: Resource-based theory and its managerial implications, non published paper; p.5.*

[2] *Bull, Adrian; Economics of travel and tourism; Pitman publishing, London,1992; p.4.*

[3] *Gunn, C.A.; Tourism, Planning, Basics, Concepts, Cases; Taylor and Francis; Washington, 1994, p.107-108.*

destination to be a geographic site that can be attractive to tourists only if it possesses the following three basic elements[1]:

1. *Attractions*
2. *Amenities*
3. *Accessibility*

In the case of Jordan, there is a distinct lack of research conducted into the tourism sector because of the late interest especially from the public side, and so studying each one of these three components may be considered the starting point for gaining an understanding of the nature of the Jordanian tourism product. This, of course, will be helpful in analysing whether Jordan is a real tourism product, ie: tourist destination, or simply a collection of attractions.

1.2. Study goal:

This study aims to develop a clear concept of the Jordanian tourism product and its components, ie: resources and services. Moreover, it is expected to give a complete image of Jordan as a destination by analysing all the related elements that influence the evolution of a destination, in order to understand the role played by both resources and services in attracting tourists, and to determine if Jordan offers adequate and competitive services.

Most tourist sites that have resources and attractions can attract tourists and can even gradually shift to become a real product, but a lack of services will diminish the benefits gained from tourist activities[2].

Conducting a survey in five Jordanian tourist sites, this study will try to answer several questions regarding the Jordanian product, such as tourist services, and to what extent these services satisfy tourist needs and expectations.

It is like building a complete image of the structure of tourism in Jordan, as the right step towards bridging the noticeable gap between the various components of the product

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[1] *Medlik, S.; Dictionary of travel, tourism and hospitality; Heinemann; Oxford; 1993; p.148*

[2] *Ashowrth, G. and B. Goodall; Marketing Tourism Places; Routledge; London; 1990; p.6.*

which are impeding the evolution of the destination. Moreover, analysing the territory and its main elements helps the decision makers to put the best strategies and policies into place that lead to the development of a competitive product in the international markets.

Obviously, the study will try to analyse the current situation, and it will not try to impose solutions or propose comprehensive vision, but it will discuss any weak points that need to be addressed in order to improve destination resources, services, and image.

Five Jordanian destinations were selected as field centres to study various aspects of the Jordanian tourism industry: Petra and Jerash, which are both very distinctive tourist cities in the cultural and archaeological areas of the country; Aqaba (and Wadi Rum) which is very important in the south of Jordan on the Red Sea; the Dead Sea (Madaba and Nebo Mount) which combine conference, curative, beach tourism, and religious tourism ; and finally Amman which is considered to be a centre for recreational tourism for tourists from the Arabian Gulf states, in addition to its political position as the capital of Jordan.

Three main criteria were used in this selection process:

1- To cover Jordan geographically - thus destinations were chosen from the north, the centre, and the south of Jordan.

2- To study the various tourism segments, including the cultural, archaeological, natural, beach, conference, recreational, curative, and shopping categories.

3- To analyse the different categories of tourist according to where they are from, ie: whether they are local, Arabic, or Non-Arabic.

1.3. Main issues and questions:

In 1946, Jordan became an independent country after a long period of British colonisation in which the country was neglected without any kind of strategy or plan for development. So, Jordan suffered from a lack of basic infrastructure and services which then needed a lot of very hard work to construct and improve. This situation, indeed, was commonplace for many of the other newly independent countries of the Arab World where independence represented only the starting point of new challenges and conflicts *which emerged in relation to the new borders and confines created by the colonising countries, in particular France and Britain, in addition to the Arab-Israeli conflict which for the most part has exhausted Arab societies*[1].

With regard to these conditions, Jordan was focussing on two basic sectors: education and health services. In the education sector, for instance, the number of students enrolled in schools as a percentage of the total population did not exceeded 2.7% in the academic year 1947/1948, while it increased to 12.24% in 1966/1967, and 30% in 1976/1977[2].

In addition, for the first decades after independence public schools tended to be found only in the big cities such as Amman, Irbid, Salt, and Al-karak. However there was some progress in the 1950's when the Jordanian government started to build this sector up to adequate levels that were in line with the national vision for development[3].

Besides all this, Jordan was also working on economic development in a similar manner to the other countries of the Third World. The Jordanian government was concentrating on specific sectors of the economy according to a national priority scale, with such important sectors being energy, water supply, transport services, communications, and mining. Improvements in these areas were carried out using public investment and under the direct control of the government. In fact, the level of direct public capital investment and management was quite high, accounting for over 55% of industrial activities by 1990[4].

It was infrastructure projects that had generally been focussed upon in government planning due to the urgency of such projects. As electricity, water, transport, and national and local road networks were important prerequisites for development, the government spent a significant amount on these services in the hope of attracting

[1] *Findaly, Allan M.; The Arab World; Routledge; London; 1994; p.21-44.*

[2] *Altal, Ahmad Yousef; Political, economic, and social conditions that influenced the education sector evolution in Jordan from 1921-1989 "Aldorouf elsiyasia wel elyktisadia wel ijtemayia alati athert fi tatwer attrbyia wet taleem fel urdun men 1921-1989" ; 2nd edition; Amman; 1989; p.181-183.*

[3] *Altarawneh, Ikhleif; Educational development "Altatweer Altarbawi"; Dar Alshorouk publications, Amman, 2003; p.27*

[4] *Saif, Ibrahim; The economic economy in a changing environment, Center for Strategic Studies; Amman; 2004; p. 122.*

investment. The total expenditure on infrastructure projects accounted for more than 30% of the Five Year Master Plan (1976-1980), and over 37% of the Five Year Master Plan (1981-1985), while the government contributed by over 53% of capital investment during the period 1986-1992[1].

By the end of the 1980's, Jordan had adopted several rapid plans to reduce dependency on the public sector by shifting emphasis to the private sector instead. These new policies were relative to many economic crises that Jordan faced, especially the critical economic crisis that had seriously threatened Jordanian economic stability in 1989, and the consequent crises related the Second Gulf War at the beginning of the 1990's causing the return of the majority of Jordanians working in the Gulf countries. Moreover, Jordan was subjected to a very severe maritime embargo on all naval vessels and other ships coming into Aqaba port.

These conditions forced Jordan to accept the demands of certain international institutions such as the World Bank and the International Monetary Fund which advised Jordan to follow a privatisation strategy by moving certain services from the public to the private sector, encouraging the private sector to invest and contribute to national development[2].

Privatisation, moreover, was also a response to the government awareness that public services were not efficient enough, and that they were not able to satisfy the needs of development and modernity, facing the risk of bankruptcy and failure, such as in the cases of Royal Jordanian, the communications and transport sector, and the glass factory in the city of Ma'an[3].

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[1] *Kasasbeh, Hamad; Public economic policies in investment stimulating in Jordan (an article written in: Jordanian economy: challenges and visions; edited by Hamarneh, Mustafa); Center for Strategic Studies – University of Jordan; Amman; 1994; p.481.*

[2] *Prokopenko, J., Management for privatization, Management development series no. 32, International Labour Organization, Geneva, 1995, p.5.*

[3] *Alwazani, Khaled and Taher Kana'an; Economic public role in the arab economies privatization: case of Jordan; (an article written in : Jordanian economy in the regional and international context, edited by Alhourani, Hani, Khaled Alwazani and Hussein Abou Rumman; Jordan Studies New Center; Sindbad publications, Amman; 1996; p. 321-330.*

Economic reform plans and privatisation had been adopted in a certain period in which were present also some critical conditions that influenced the entire Middle East region such as the launching of the Peace Process in the Spanish capital of Madrid, the signing of the Oslo Treaty between the Israelis and the Palestinians, and then the signing of the Wadi Araba Treaty between Jordan and the Israelis. These treaties gave the Middle East a new economic and political atmosphere, and also changed the way the region was generally perceived. Moreover, these agreements opened up some economic areas such as the Qualified Industrial Zones (QIZ) which give investors the right to export to USA markets with exemption from customs duty, provided that the final product contained at least 8% of raw materials of Israeli origin[1].

By the new millennium, Jordan was continuing to implement various procedures and policies in order to deal with the various challenges imposed by globalisation. The economic liberalisation strategies were aimed at breaking all barriers that might impede the access of Jordanian exports to world markets, particularly American and European markets. To achieve the same goals, Jordan joined the World Trade Organization in 2000, and enacted new economic laws and regulations restructuring the fiscal system and customs forms to be in line with the terms of the Free Trade Agreement (FTA). In addition, privatisation was also considered to be an intelligent choice to improve the efficiency of public services on the one hand, and on the other to attract foreign investment to Jordan.

By 2000, the free trade agreement between Jordan and the USA was signed, giving Jordan many economic privileges and free access to USA markets. Indeed, there were very few countries like Israel and Egypt.

In the same year, Jordan launched its distinctive initiative regarding the city of Aqaba by establishing the Aqaba Special Economic Zone Authority (ASEZA) with a clear vision for development by 2020. The idea was well received from the beginning, attracting more than 1.2 billion dollars to the tourism and industrial sectors, as many tourist projects

[1] *Alsa'di, Ahmad; Jordan Economy: today and the future "Iqtesad alurdoni, waqe' we afaq"; Alnudhum publications, Amman; 2002; p. 168-172.*

were being carried out on the south coast. The goal of the authority is to create over 70 thousand jobs by 2020[1]*.*

The main privileges of ASEZA are as follows: full exemption from social services taxes, the exemption of imported goods from customs tax and fees, only 7% sales tax levied on imported goods as opposed to the usual 13%, and economic activities and enterprises are subject to 5% income tax in Aqaba as opposed to 15% - 35% in the rest of Jordan[2]*.*

As with other economic sectors, tourism was also influenced by these developments, and there were several evaluative stages during which the Jordanian government gave special attention to the strategies of the tourism sector, with the aim of launching this important sector after a long period of abandonment and marginalisation. This was especially during and after the occupation of the West Bank, during which some cities such as Jerusalem and Bethlehem represented the main religious tourist attractions for incoming tourists to Jordan.

Throughout the Five Year Master Plan (1976-1980), Jordan aimed to increase the number of tourist arrivals from 700,000 to 1.5 million with a growth rate of 16%. The government continued with the same strategies in the period from 1981-1985 in which more than 22 small tourist projects were constructed or improved in order to promote the tourism industry.

In the Five Year Master Plan (1986-1990), Jordan had succeeded in implementing its strategies and plans to increase the contribution of tourism to the GDP by 14.6%, and the added value of the tourism sector by around 7.3%.

The 1990's were seen as a very important period for the Jordanian tourism industry, when Jordan accelerated the structural reform process for its economic system, adopting privatisation policies and market liberalisation by enacting the necessary regulations and laws that regulate the Jordanian economic sectors, tourism included. These policies included giving investors the land they needed in order to realise their tourist projects,

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[1] *Jordan Economy Situation: report on the Jordan economy performance in 2000; Jordan Center for Economic Development, Amman; 2001; p.17-19.*

[2] *Alsa'edi, Ahmad; previous mentioned source; p. 173.*

improving the Ammoun Hotel Studies College by linking it to the Ministry of Tourism and Antiquities, and encouraging Tourism Studies[1].

Since the signing of the 1994 Peace Treaty between the Israelis and Jordan, the tourism sector has increasingly grown and its contribution to the GDP now accounts for 11.6%[2]. *This escalating growth has caused the Jordanian government to think seriously about giving the private sector an increased say in the decision making process, and for this reason the Jordan Tourism Board (JTB) was established in 1998, with the aim of preparing and adopting adequate marketing strategies to efficiently promote the Jordanian tourism product worldwide. JTB Regulation No. 62/1997, issued according to Tourism Law No. 20/1988, states that the JTB should be composed of permanent members and other elected members who represent all the tourism industry components and stakeholders, whether in the public or private sector, such as MOTA, Royal Jordanian, tourist transport enterprises, classified hotels, travel agencies, and so on*[3].

Considering the fact that the development of tourism was more significant during the mid 1990's, it becomes quite evident that it is important to identify the Jordan tourism product, study its components, and explore the nature of the relationship that connects resources and services. By doing this, Jordan becomes more capable of planning and creating strategies in terms of tourism sector development, and to understand its real potential in comparison with neighbouring countries and to how improve the potential of the country to attract tourists to Jordan.

This study will try to highlight some of the important aspects of the national system of tourism in Jordan, starting from the identification of the tourism industry in Jordan and its role in the Jordanian economic structure, and this will be followed by a discussion of the strategies, policies, and regulations which directly control the direction of the tourism sector.

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[1] *Athamneh, Abed Albaset; The economic dimension for tourism development in Jordan, an article written: Jordan and tourism: problems and challenges on the field; edited by Haddad, Muhanna ; Anthropology and Archaeology Institute, Yarmouk University ; Irbid; 1997; p.128-136.*

[2] *Barham, Nasim, Sabine Dorry and Eike W. Schamp; Relational governance and regional upgrading in global value chain: the case of package tourism in Jordan, Die Erde; 138, 2007; p.172-176.*

[3] *Jordan Tourism Board (JTB) regulation no.62/1997, issued according to the paragraph A of the article no.14 in the tourism law no.20/1988, published in the official gazette no. 3552 issued on 1st June1988.*

The characteristics and motivations of tourists themselves are also going to be analysed in order to categorise the markets that bring tourists to Jordan, and to understand which of the Jordan product elements attract tourists, including how certain geographic, social and cultural factors affect the tourist flow to Jordan.

Then we will examine one of the most problematic issues, which is the relationship between the private and public sectors, in terms of their roles and responsibilities, handling of tasks, destination management, and marketing on a national and international level.

In this context, we can point out some of the basic questions to be answered:

- *Does Jordan have a real tourist system (resources and services)?*
- *Are the services (accommodation, transport, restaurants) offered in Jordan adequate in terms of quality and price?*
- *To what extent is the Jordanian tourism product seen as a competitive one in comparison with the products of the neighbouring countries?*
- *To what extent are tourists satisfied with the Jordanian product?*
- *Which of the Jordanian destinations are more prepared in terms of resources and services?*
- *Which kind of tourists are coming to Jordan and what are their characteristics?*
- *What are the most appreciated things about the Jordanian tourism product?*
- *What are the less appreciated things of the Jordanian tourism product?*
- *What obstacles are faced by the Jordanian tourism development strategies?*
- *Are the incentives great enough to attract investment to the Jordanian tourism sector?*
- *Is it better for Jordan to build common marketing strategies with neighbouring countries?*
- *What are the current and potential tourism resources in the Jordanian product?*

- *What is the expected impact of building a partnership between the public and private sectors of the tourism industry?*
- *Is Jordan promoting its tourist attractions as it should be?*
- *Which promotion plans and programmes have been conducted to attract tourists, and at which kind of tourists have these plans and programmes been addressed?*
- *Does the private sector play the role it deserves in tourism sector decision making?*
- *What is the impact of multiple decision making on tourism planning?*
- *How can we describe the relationship between the JTB, MOTA, ASEZA, and the Petra Region Authority?*
- *What is the nature of the relationship between the JTB and the private sector?*
- *What is the role of the private sector in the enactment of laws regulating tourism activities?*
- *What are the main plans and projects that should be made to improve tourism marketing performance?*
- *What should the Jordanian product be by 2020?*
- *Is there sufficient information available on the tourism industry in Jordan?*
- *Is the Jordanian statistics system regarding tourism efficient?*

1.4. Study Structure:

The structure of this study has been carefully arranged to analyse the national tourism system, giving a very clear vision about that system and its main components, and responding to research objectives.

In the first chapter will be presented the main questions of this thesis, their importance, to what extent it is necessary to cover these topics, and what results we might expect to reach by exploring the tourism system in Jordan.

In addition, the main questions will be highlighted in the introduction that this research will try to deal with, and a review will be given of the most significant scientific efforts made by previous scholars and researchers in this field, which hopefully will enrich the discussion of this interesting topic. The last part of the introduction will be looking at some of the obstacles that are faced in doing this type of research.

The second chapter will introduce the tourism industry, and give an idea of the role played by tourism in economic development, identifying the position that tourism occupies as a social force in the developing countries, and pointing out the contribution of the tourism industry to the strategies of development conducted in these poor countries.

The third chapter will focus on the Jordanian tourism sector, its economic impact on the national economy, the amount of capital invested in tourism, and the contribution that tourism makes to the Jordanian labour market by creating new job opportunities.

A number of strategies and plans implemented by the Jordanian government to enhance the tourism industry are going to be discussed, highlighting the Jordan tourism vision for 2020, and the main master plans that aim to realise these projects.

The fourth chapter will introduce the most significant laws and regulations that affect tourism, and regulate the development phases of this sector, also looking at laws that encourage investors who benefit from the various incentives that can be received according to these laws. Moreover, it will be shown how laws have been passed in a drive to conserve the unique archaeological sites of Jordan, by protecting them from any kind of disruption or damage. In this way the cultural heritage of Jordan is protected by law. In addition, I will also consider the distribution of roles and responsibilities between the different public bodies working in the different regions of Jordan.

The fifth chapter will deal with the flow of tourists in relation to tourist movement volume, the nationalities of the tourists, their motivations to visit, their average length of stay in Jordan, and the main characteristics of tourists coming to Jordan.

The sixth chapter will cover the research process followed by the author, indicating the methodology used, and the way of collecting and processing the data.

Finally, the seventh chapter will be the applicative part of the study in which we will try to give a comprehensive overview of the results reached by the author regarding this field. To begin with, we will analyse tourism resources from several points of view, and explore the relationship between: public and private sectors; the decision making process; responsibilities and role sharing, particularly in relation to promotion and tourist site management between MOTA, the JTB, and other public and private stakeholders involved in the tourism industry.

Moreover, we will identify the main characteristics of the Jordanian tourism product, and to what extent this product satisfies the needs and expectations of the tourist by comparing the product quality and price with those offered in neighbouring countries, and by measuring the competitiveness of tourism in Jordan with that of the international markets. In this context, we will also highlight the pivotal role of the transport sector and its impact on both the quality and price of the final product as presented to tourists.

Talking about competitiveness, it is important to consider the Jordan tourism vision for 2020 as prepared by MOTA, where it seems useful to gather the opinions of the experts about the future of the Jordanian product, the features of the markets to which this product should be presented, and their opinions on which kind of partnership should be built with the neighbouring markets in order to conduct joint marketing plans and projects.

This writer is also going to discuss the Jordanian tourist statistics system, and whether it is efficient enough to serve the needs of the tourist bodies in terms of the information and statistics that help to analyse the movement of tourists, and to categorise them according to their motivation to visit, and their social, demographic, economic and cultural backgrounds. Such operations serve to build the product according to the real needs and expectations of the tourists.

In this part, the author will focus upon the importance of having an efficient tourist statistics system in Jordan whereby data can be collected, analysed and processed, thus providing decision makers, investors, tourist package producers, and other parties with all the necessary information they need in order to understand market trends and demand.

1.5. Previous studies and literature:

Many studies have discussed the importance of tourism, analysing the various aspects of this industry. Lea (1991) talked about tourism in the Third World, dividing the tourism industry into three main parts:

1- *Tourist demand - the degree of which depends upon a number of factors such as:*

- *rising income and quality of life*
- *increased geographical mobility*
- *improved transport*
- *need for escapism*
- *educational level*
- *new marketing tools*

2- *Intermediaries in the tourist markets, which are divided into four categories:*

- *travel agencies*
- *tour operators*
- *hotel companies*
- *transport companies*

3- *Tourist destinations (supply) which are usually influenced by:*

- *historical connections*
- *accessibility*
- *stability*
- *Nature of tourist product*
- *foreign exchange*

Lea describes the relationship between the tourism industry and its main components, the resources and services offered to tourists, and he concludes that the tourism industry is often subject to the willingness of the intermediaries, where they are usually moving the tourist flow according to their personal interests.

In his research, Lea found that developing a tourist site to make it even more attractive to tourists has several positive impacts:

- *foreign exchange earnings*
- *an increase in the Gross National Product*
- *increased government yields generated from taxes and fees*
- *creation of jobs and a reduction in unemployment*
- *improved social services and living standards*[1]

In other studies researchers such as Lickorish, Jefferson, Bodlender and Jenkins have tried to identify a tourism product as a set of components that go beyond the sites or natural attractions themselves to a number of services and facilities that the tourism industry requires. In this context, Jefferson says:

"Product development must be concerned with the provision or enhancement of services, transport, accommodation, attractions and infrastructure and designed to enhance the experience of the visitor"

In their studies, they have pointed out the essential elements which should form a part of any tourism product, seeing in London, for example, a good combination of the various required components, such as heritage, museums, cinemas, international airports, entertainment, shopping centres, hotels of the full range of categories, hospitals, a business environment, and so on. It was also noted that there were certain weaknesses in the London tourism product in terms of high ticket costs, weak night life, shopping centres being closed at certain times of day in the week and on Sundays, and the extremely expensive services and facilities (Lickorish, et al*, p. 49-51).*

[1] *Lea, John; Tourism and development in the Third World; Routledge; London; 1991; p.1-50*

Researchers also found that an effective strategic plan for tourism development for any destination should incorporate certain key aspects:

1. *Evaluation of the tourism supply*
2. *Analysis of tourist demand*
3. *Identifying tourism sector growth targets*
4. *Identifying tourism sector components, (Lickorish, et al (1991), p.71-75)*

Lickorish, et al, (1991) conducted their study in several countries, including both industrialised and developing countries. Included in the list were India, Nigeria, Morocco, Indonesia, Britain, Mexico, Thailand, and other countries[1].

According to Douglas Pearce (1989), the main elements that a tourist destination needs to offer its clients are:

1. *Attractions*
2. *Transport*
3. *Accommodation*
4. *Supporting facilities*
5. *Infrastructure*

Moreover, Pearce has distinguished between five forms followed in the destination development process:

1. *Spontaneous development, for example, as found with the Costa Brava.*
2. *Planned development, such as found with the Black Sea Coast.*
3. *Extensive development, such as can be seen with the Languedoc-Roussillon region of France.*

[1] *Lickorish, Leonard J.; Alan Jefferson; Jonathan Bodlender; and Carson L. Jenkins; Development Tourism Destinations: policies and perspectives, Longman, UK, 1991, p. 3-113*

4. Integrated development, ie: development that is planned and conducted by one agent without receiving any kind of support or input from other stakeholders in the area. An example of this type is the development of the La Plagne resort in France.

5. Catalytic development, which is also carried out by one agent but with the involvement of other partners and stakeholders, giving them the opportunity to take part in the project by offering ancillary services such as restaurants, cafés, and other facilities, for example the Vars Ski Resort in France.

Pearce has also explained his vision for tourism planning by dividing it into three basic levels:

1. *Tourism planning on the national level.*
2. *Tourism planning on the regional level.*
3. *Tourism planning on the local level*[1].

Meanwhile Miossec (1976, 1977) was able to develop a new model that can explain tourist destination evolution in a hierarchical way, taking into consideration both the elements of "time" and "space"[2]*, which postulated four essential issues that should be taken into account in the development process, namely*[3]*:*

1. *Resorts.*
2. *Transport network.*
3. *Tourist behaviour.*
4. *Attitudes of decision makers and the local community.*

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[1] *Pearce, Douglas, Topics in Applied Geography: Tourist Development, Longman, New York, 4th edition, 1989, p. 6-87.*

[2] *Miossec, J.M, Un Modele de l'espace touristique, L'espace Geo graphique, 1977.*

[3] *Miossec, J.M, Elements pour une theorie de l'espace touristique, Les cahiers du Tourisme, Aix-en-Provence, 1976.*

In his theory Miossec wanted to identify tourist destination evolution in four phases, starting with a tourist site that is relatively isolated and ignored until it becomes an attractive site for tourists, offering the various kinds of services and facilities that are required, (Transport, Accommodation, Infrastructure, and so on, see Figure No.1).

Butler (1993) emphasised the necessity of periodic analysis of the tourism industry, taking into account all the elements of this sector. According to Butler, these analyses should also try to compare the destination before and after the implementation of development strategies and projects[1].

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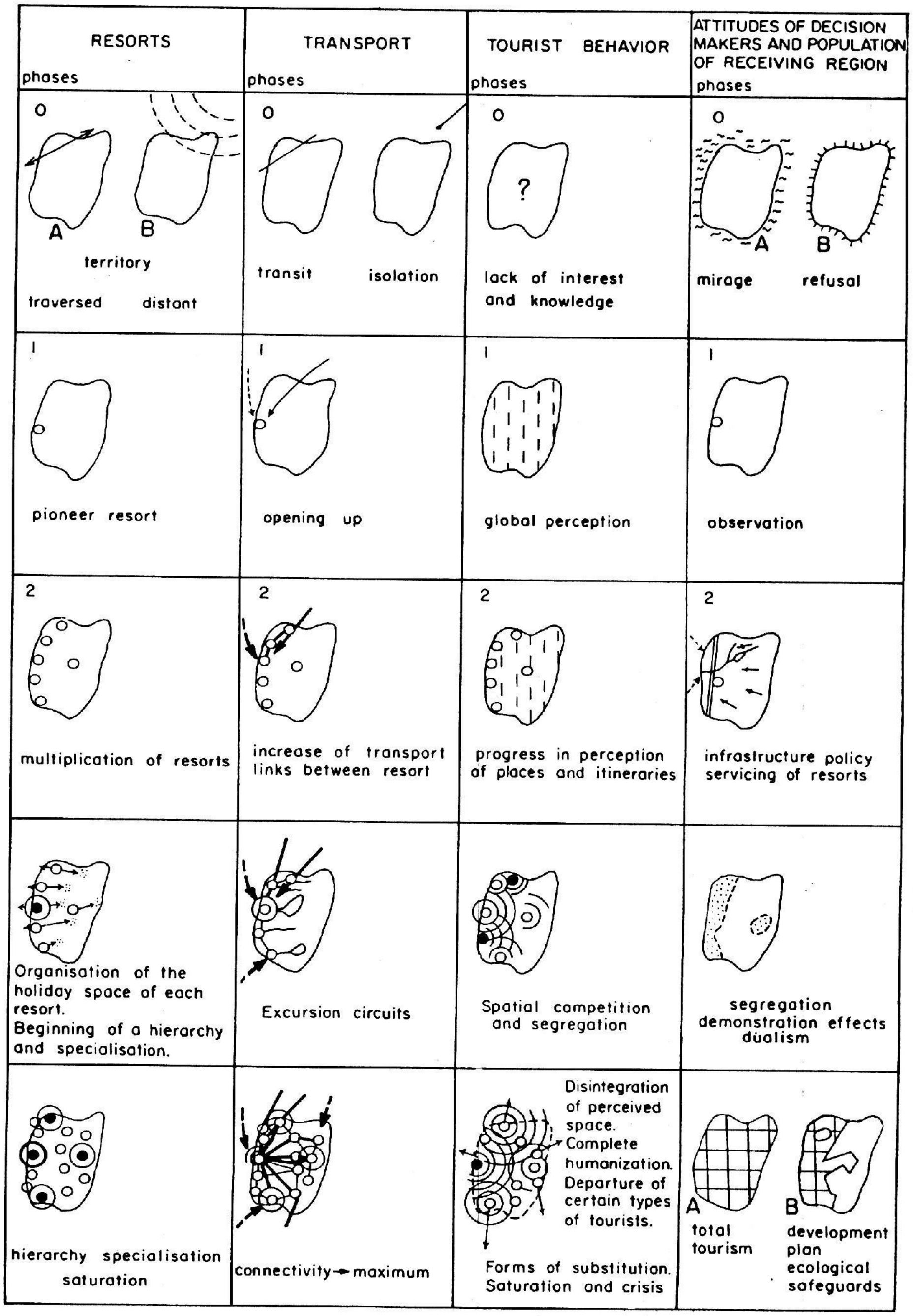
[1] *Butler, Richard W; Pre-and post-impact assessment of tourism development; an article written in (Pearce, Douglas G. and Butler, Richard W., Tourism Research: Critiques And Challenges, , Routledge, London,) 1993, p. 135-150*

Tourist Destination Evolution

Figure 1



**A synthesis of the dynamics of tourist space, (Miossec, 1976)*

In this context Hawkins (1993) has also proposed a set of factors that influence the tourist destination growth and evolution, calling for a serious assessment of their impact on a tourism destination. These factors are:

- *the carrying capacity of the destination in both its economic and social aspects*
- *the environment surrounding the destination*
- *the increasing need for infrastructure projects in relation to tourism industry growth*
- *technological progress*
- *regional conflicts and terrorist attacks*
- *the shift to market-driven economics*
- *the process of involvement of the local community*
- *demographic changes in societies*
- *the diverse lifestyles that emerge in tourist destinations*
- *the increasing need for qualified human resources*
- *the necessity for the recognition of cultural diversity*
- *the privatisation of public services in many countries*
- *health and security issues*
- *the influence of multinational companies and global firms*[1].

Smith (1980) also defined the tourist site as a set of infrastructure and attraction components that encourage tourists to come and visit the destination, these components being the absolute essential conditions for attracting tourists. However, other surrounding tourist sites can also be used as a tool to strengthen the product image and

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[1] *Hawkins, Donald E.; Global assessment of tourism policy; an article written in (Pearce, Douglas G. and Butler, Richard W., Tourism Research: Critiques And Challenges, , Routledge, London,) 1993, p. 175-198.*

competitiveness of a destination in the national and international tourist markets, (see Figure no. 2)[1].

Diagram of tourist region

Figure 2

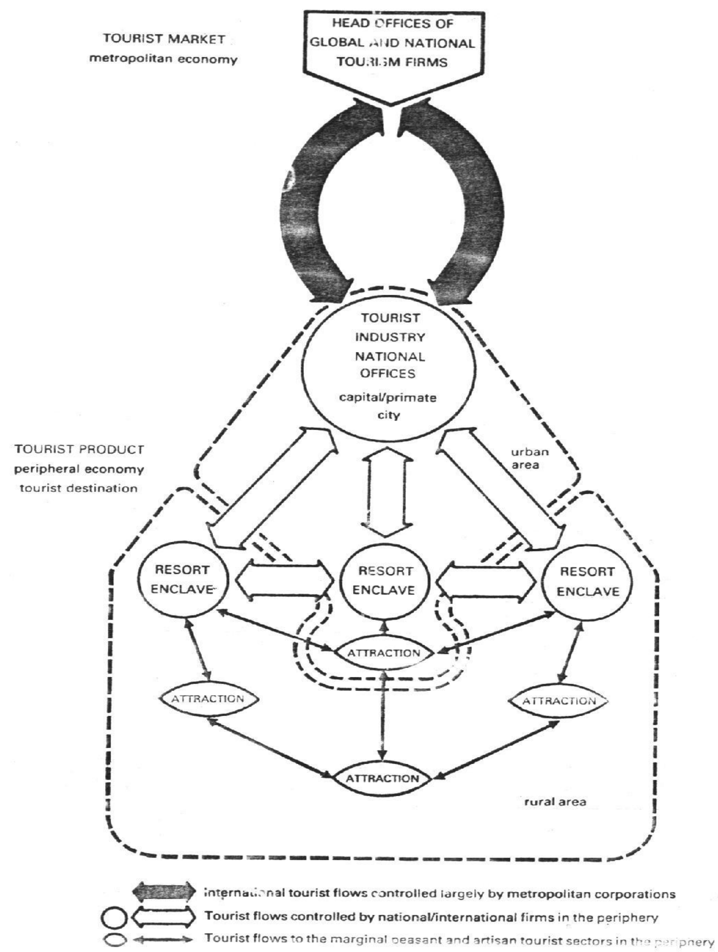
Table no. 1 :Diagram of tourist region (Resource: Smith, 1980)

- CORE	⇒	• *Attractions and facilities*
- DIRECT SUPPORT ZONE	⇒	• *The local residents* • *Stores* • *Recreational facilities* • *Government offices serving the people* • *Support services for the tourism industry*
- INDIRECT SUPPORT ZONE	⇒	• *Investment environment* • *Jurisdictional realm of the host state*

[1] *Smith, V.L; Anthropology and Tourism; Science Industry Evaluation; Annals of Tourism Research; 7; 1980; p. 13-33.*

With the Britton model (1981) on the development of tourism in rural areas, (enclave model of tourism in a peripheral economy), the importance of achieving the right combination of natural resources and services becomes more evident. According to Britton, tourism is usually concentrated in the big cities and those resorts that are in their vicinities, which allows the tourists to benefit from the abundance of facilities and services, while tourist sites which are far from these services remain excluded from the tourist flow, (see Figure no. 3).

Figure no. 3 Enclave model of tourism in a peripheral economy[1]



Source: Britton (1981)

([1]) John, Lea, Tourism and Development…, mentioned resource. P. 15

The fundamental elements that should be present for any tourist site to be successful are: natural resources, manmade resources, community development, the required services and facilities, and finally tourists whose presence is seen as a result of the development process. In the light of this, the cooperation between all these stakeholders becomes a necessity as the development of the destination is a common interest for all of them, creating tourism value and improving the quality of life in the destination[1].

The "Linear Model" created by Erik Cohen seeks to analyse tourist destination evolution through the identification of various stages of tourism industry growth in a destination, dividing them into:

1. *The Discovering Stage - when the site first starts to attract tourists.*
2. *Local Response and Initiative Stage - in which locals try to offer simple tourist services, looking forward to getting the benefit of tourist flow.*
3. *Institutionalisation Stage - in which even outside investors become involved in the destination with capital investment. In this phase, the tourist site becomes global rather than just local*[2].

Other studies have discussed the relationship between tourism and development, pointing out the necessity of tourism planning. Some of these studies have looked at tourism in the European countries, such as Allan, M. Williams, Gareth Shaw, Manuel Valenzuela, Russell King, Lila Leontidou, Jim Lewis, Andrew W. Gilg, Friedrich Zimmermann, Justin Greenwood, John Tuppen, Peter Schnell, David Prinder, Knut S. Brinchmann, and Morten Huse, and they have looked at the successful models used in some tourist destinations to attract tourists, appreciating the pivotal role played by public policies in these countries that aim to promote the tourism industry[3].

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[1] *Britton, Stephen; Tourism, Dependency and Development: a mode of analysis; an article written in "Tourism: Critical Concepts in the Social Sciences" edited by : Stephen Williams; Volume III, Rutledge, London and New York, 2004, p. 29-48*

[2] *Malhotra, R.K., Encyclopaedia of Hotel Management and Tourism, Anmol Publication PVT, New Delhi, 1997, p 144.*

[3] *Williams, Allan M., and Shaw, Gareth, Tourism and Economic Development: Western European Experience, John Wiley and Sons, England, 1991, p. 1-11*

The importance of the relationship between resources and services was also the core of a distinctive study conducted by several Italian universities in fourteen Italian destinations, (Misa Esino Frasassi, Marca Trevigiana, Garda; Domtomiti; castelli Romani; Alt Marina; Venezia, Versona; Urbino; Terre dell' infinito, Sannio, Penisola Sorrentina; Napoli, Monte lepini).

This extensive project was led by Prof. Sergio Sciarelli and analysed the local tourism systems in these fourteen destinations in relation to the strategies and policies adopted to manage them. Moreover, the project focused on the governance issue, and to what extent the main stakeholders are involved in the decision making process, especially those decisions that concern the tourism industry parties.

The study has also explored the nature of the cooperation between the various stakeholders in both the private and the public sector, and the strategic choices that have been followed in their tourist activities. In addition, the main attractions of these destinations were presented, identifying the facilities and services offered as well[1].

Regarding the Jordanian tourism realm, there are few studies that deal with the tourism industry of Jordan, due to the fact that most of the studies that have been carried out covered the archaeological and historic aspects of the destination, neglecting the tourism value of these sites, outside these particular aspects, (Dornemann, 1983[2]; Northedge[3], 1992; Hadidi[4], 1982; Al-Shawa[5], 1993; McKenzie[1] 1990; MacDonald[2], 1994; Hijazi[3], 1991; Kareem[4], 1987; Khoury[5], 1995).

[1] Sciarelli.S (2007), "Il management dei sistemi turistici locali: Strategie e strumenti per la governance" Giappichelli Editore – Torino.

[2] Dornemann, Rodolph Henry; The Archaeology of Trans-Jordan in the Bronze and Iron ages, Milwaukee public Museum, Wisconsin, 1983

[3] Northedge, Alastair; British Academy Monograph in Archaeology, the British institute in Amman for Archaeology and History by Oxford University press, Oxford, 1992.

[4] Hadidi, Adnan; Studies in the History and Archaeology of Jordan, Department of Antiquities, Amman, 1982.

[5] Al-shawa, Ala'uddin Abdul Jawwad; Restoration of an Archaeological Building: Hercules temple in Amman, 1993.

Thus, tourism was usually included in those studies that examined the structure of the Jordanian economy and the impact of political conflict on its performance. However, by the end of the 1980's and the beginning of the 1990's, there was an increasing tendency to look at the tourism sector of Jordan in studies made by American, European, and Japanese centres.

The Japanese International Cooperation Agency (JICA) conducted in 1997 a global study on tourist activities within Jordan, presenting the most significant components of the Jordanian product, and the main attractive points, (ie: destinations), visited by tourists.

The study categorises the tourist flow visiting Jordan and the Middle East region into cultural, historical, archaeological, natural, and holiday tourism, depending on the resources and attractions that each of these countries has, as well as their ability to promote themselves in the international tourism markets.

JICA points out that Jordan is a very rich country in terms of resources (natural, cultural, and archaeological) which are not well exploited in a manner that would attract tourists. Indeed, while some Jordanian destinations like Petra and Jerash are present in the Jordanian tourism product promoted outside the country, other important destinations, from JICA's point of view, such as Umm Qais, do not take the position that they deserve in tourist programmes and itineraries prepared for incoming tourists. Moreover, some very impressive natural sites, such as Wadi Al-Mujeb and Wadi Alhasa, seem to be neglected in the national marketing strategies. So despite the cultural, archaeological, and natural richness of the Jordan tourism product, JICA found that these destinations are of very poor presentation. Many of them actually lack the most

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[1] *McKenzie, Judith; The Architecture of Petra, British Academy Monographs in Archaeology, New York, 1990*

[2] *MacDonald, Burton; Ammon, Moab and Edomi Early states/nations of Jordan in the Biblical period, Al Kutba, Amman, 1994.*

[3] *Hijazi, Hana Mismar; The late Bronze Age temples in the vicinity of Amman, Jordan; 1991.*

[4] *Kareem, Jum'a, Evidence of the Umayyad Occupation in the Jordan Valley as seen in the Jisr Sheikh Hussein Region, 1987.*

[5] *Khoury, Muna S.; Jerash glass corpus; glass excavated in 1982-1983, by the Australian and British teams, 1995.*

basic services such as highway signs, car parks, visitor centres, tourist booklets and brochures, restaurants, toilet facilities, and so on, while others need to undergo some renovation in order to reach tourism industry standards, as has been carried out in Taybet Zaman Village Resort which lies in the vicinity of Petra.

Regarding Jordanian strategies, JICA emphasised the importance of putting into action current tourism sector policies, and the drawing up of a global tourism strategy similar to a road map for all stakeholders working in the tourism industry, especially since many of them complain about the multiplicity of decision making referents, causing weak and uncoordinated policies.

The JICA report also advised the planning of a number of urgent and essential projects related to the tourism sector in a number of Jordanian cities, these projects being:

1. *The Amman Downtown Tourist Zone*
2. *The National Museum*
3. *Historic Salt city*
4. *The Dead Sea Panoramic Complex*
5. *Madaba-Dead Sea Parkway*
6. *Karak Tourism Development*[1].

The American Programme (USAID-AMIR) conducted several studies on the Jordanian tourism industry in cooperation with the Jordan Tourism Board (JTB) and The Ministry of Tourism and Antiquities (MOTA). One of these studies looked at Arab tourists coming to Jordan (USAID,2002) by distributing a number of questionnaires to this group in different Jordanian destinations, looking into their motivations, stay length, visited destinations, and expenditure rate.[2]

In another study (2002), AMIR Programme attempted to analyse the evolution of the tourism product, indicating the main components offered in the tourist markets. The study

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[1] *JICA (Japan International Cooperation Agency), The study on the Tourism Development Plan in the Hashemite Kingdom of Jordan, February 1996.*

[2] *USAID-AMIR Program; The Market Survey Among Arab Tourists to Jordan, September 2002.*

concluded that the current main categories of the Jordan tourism product are cultural and archaeological tourism, religious tourism, adventure tourism, eco-tourism, health and wellness tourism, cruising, conferences, and scientific tourism, while the potential categories to be developed further are summer or family tourism, conference tourism, festival and cultural event tourism, filming and photography, and sports. The product analysis was carried out in nine Jordanian locations, namely, Amman, Petra, Aqaba, the Dead Sea, Wadi Rum, Irbid, Azraq, Dhana, and Karak[1].

By 2003, the AMIR programme had completed its third study on the tourism labour market in Jordan, analysing its dimensions and the total number of employees involved in it, and highlighting all strategic plans made to enhance the qualifications and work skills of those employees to match the needs of the tourism industry. The survey looked at various categories in the tourism sector such as hotels, restaurants, handicraft shops, tourist transport companies, and even public tourist administration[2].

AMIR also looked at the competitiveness of the Jordanian product in comparison with those of neighbouring countries. For this purpose it chose to do comparisons with Egypt, Israel, Syria, Lebanon, Oman, Dubai, Tunisia, and Turkey. The study concluded that in relation to the Jordanian product the international tourist markets are divided into:

- *International tourist markets that bring tourists to Jordan, which subdivide into: Arab tourist markets such as Saudi Arabia, Bahrain, and Kuwait; and Non-Arab Tourist Markets such as Germany, France, Britain, The Netherlands, Belgium, Italy, Spain, and the USA.*

- *International destinations that are similar to the Jordanian product, attracting the same categories of tourists. These destinations are divided into: firstly, those that are competing with Jordan for the Arab Tourist Markets, namely, Lebanon, Syria, Egypt, Dubai, and Turkey; and secondly, destinations that compete with Jordan in terms of the Non-Arab tourist markets, namely, Israel, Egypt, Oman, Dubai, Lebanon, Syria, and Tunisia.*

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[1] *USAID-AMIR, National Tourism Strategy Initiative, Product Development Work Group Report, Amman, 2002.*

[2] *USAID, AMIR; Manpower Training and Education Survey of Jordan Tourism Industry, Amman, 2003.*

The study shed some light on the strategies of marketing followed in the destinations mentioned above, and the methods used to promote these tourism products in the international markets, taking into consideration the product pricing policies and quality level in these destinations[1].

As well as these foreign scientific efforts, some Jordanian academics, both those based in Jordanian universities and those who are studying abroad, have carried out research into tourism in Jordan. These studies, for the most part, were conducted using the tourism geography approach, in particular those made or supervised by Prof. Habes Samawi and Prof. Naseem Barham, from the department of geography at University of Jordan (Samawi, 1981[2]*; Samawi, 1994*[3]*; Barham, 1989*[4]*; Barham, 2007*[5]*). Moreover, there are other studies that have made use of the geographical approach such as the study of Sweis*[6] *(2001), on the tourist flow of the Jordanian religious sites, Azzumor*[7] *(1985) on local tourism in Jordan, Zureiqat*[8] *(1999) on the use of climatic factors in the classification of tourist destinations in Jordan, and Bathathu*[9] *(2006) in which the author explains how to use the Geographical Information Systems (GIS) in the improvement and planning of Jordanian tourist sites.*

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[1] *USAID-AMIR, Jordan Competitive Comparative Study, Amman, 2003.*

[2] *Samawi, Habes; Tourism geography in Jordan, unpublished research, University of Alexandria, 1981.*

[3] *Samawi, Habes; Tourism and recreation in Jordan, Jordan History Committee publications, Amman; 1994.*

[4] *Barham, Naseem; Winter recreation in the Jordan Rift Valley, Tourism Recreation Research, 142, 1989, p. 33-39.*

[5] *Barham, Naseem, Relational Governance and Regional Upgrading in Global Value Chains, The Case of Package Tourism in Jordan, Die Erde 138, 2007, p.169-186.*

[6] *Sweis, Salam Ayed; Tourist demands in Jordanian religious sites; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman; 2001.*

[7] *Azzumor, Zuhdey Husney, Local tourism and picnicking in Jordan, Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman; 1985.*

[8] *Zureiqat, Fares Husein; Climatic factors use in the classification of tourist destinations in Jordan, Theses Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman;1999.*

[9] *Bathathu, Ibraheem Khaleel; Planning, rehabilitation, and promoting of Jordanian tourist destinations by the using Geographical Information Systems (GIS); Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman; 2006.*

Other studies looked at the analysis of specific tourist destinations, such as Al-Rabadhi[1] (1996) on the tourism of Madaba Governorate, Al-Nawaiseh[2] (2001) on tourism activities activities in Karak governorate, Al-Muheirat[3] (1995) on the tourism of the eastern coast of the Dead Sea, the comparative study carried out by Alrawadieh[4] (2007) on the tourism tourism in Petra, Wadi Rum and Aqaba, and the study carried out by Tanaka, Yamaguchi, and Tamagawa [5] (2005) on tourism in the developing countries and local resources, focusing on the cities of Salt and Karak as the case study.

The tourism industry has also caught the interest of some economists who have suggested a link between tourism and economic development in Jordan. Of these studies we can point out the research conducted by Sousan[6] (1996) about the added value of the tourism sector in Jordan; Ta'amneh[7] (2001) looked at the impact of tourism on the Jordanian economy in the period 1980-1999; while Rayyan[8] (1997) discussed the future of

[1] *Al-Rabadhi, Zohour Abboud; Tourism and recreation in Madaba Governorate and its evolution; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1996.*

[2] *Al-Nawaiseh, Younis; Tourism development in Karak Governorate; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 2001.*

[3] *Al-Muheirat, Barakat; Tourism development on the eastern coast of Dead Sea; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1995.*

[4] *Alrawadieh, Ziad; The golden triangular: Petra, Wadi Rum and Aqaba; published by Amman Governorate ; Amman; 2007.*

[5] *Tanaka, Nami; Tanaka, Kazunari; Yamagnchi, Keiko; and Tamagawa, Eri; The Regional Resources and Tourism Development in Developing Countries: A case study of Salt and Karak, Jordan, WTO World Tourism Barometer, Vol.3 No. 3, 2005*

[6] *Sousan, Khaled Mamdouh; The added value and multiplier of tourism sector in Jordan; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1996.*

[7] *Ta'amneh, Mutee' Shebli; Tourism role in the economic development in Jordan in the years between (1980-1999); Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 2001.*

[8] *Rayyan, Darweesh; Exploring tourist investment in Jordan: results and expectations; Theses Deposit Center; Main Library of the University of Jordan; Amman 1997.*

investment in the Jordanian tourism sector; and finally Al-Uqaili[1] (2004) presented the main economic criteria for investment in Jordan.

Other researchers have examined the impact of public policy on tourism sector movement (Al-Nawafleh[2], 1999), while others sought to evaluate the performance of tourist public administration (Younis[3]; 1998), and to explore the relationship between the private and public sector concerning the tourism industry and to what extent this relationship matches the actual needs of several players in the field (Brand[4]; 2001), while (Reid and Schwab[5]; 2006) looked at sustainable tourism strategy in Jordan.

The topic of the marketing of the Jordanian product was also addressed in various Jordanian studies, with some of them identifying the nature of tourism marketing and the different kinds of strategies that have been adopted in Jordan (Al-Haj Deeb[6]; 1990), while others have explored the image of Jordan as a tourist destination in the international markets and how tourists perceive the country, (Schneider and Sonmez[7]; 1999).

Finally, the importance of local communities as vital partners in tourist destination management was of interest to many researchers, with most of them considering the involvement of locals in the tourism industry to be essential. Scholars tried to understand

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[1] *Al-Uqaili; Abdullah Abd-Alkareem; The economic criteria for investing in tourist projects in Jordan: with the case study of Ajloun City; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 2004.*

[2] *Al-Nawafleh, Ahmad Haroun; The impact of public policies on tourist activities in Jordan; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1999.*

[3] *Younis, Ahmad Hussein; Evaluation of tourist public administrations performance in Jordan; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1998.*

[4] *Brand, Laurie A.; Displacement for Development? The Impact of Changing State-Society Relations, World Development vol. 29, No. 6, pp. 961-976, 2001*

[5] *Reid, Margaret, and Schwab, William; Barriers to Sustainable Development: Jordan's Sustainable Tourism Strategy, Journal of Asian and African Studies, Vol. 41 (5/6). 2006, p. 439-457.*

[6] *Al-Haj Deeb, Faisal; Tourism marketing in Jordan: incoming tourism, current situation and the way to develop it; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1990.*

[7] *Schneider, Ingrid and Sonmez, Sevil, Exploring the touristic image of Jordan, Tourism Management Journal 20, 1999, p. 539-542*

the perception that locals have of the tourism industry and whether they encourage it or not. Of these studies on tourism and the local community, a major one is that carried out by Hejazeen[1] (2007), where interviews were carried out of people in various categories in five tourist Jordanian destinations. In the same field Khasawneh[2] (1998) sought to shed some light on the impact of the tourism industry on the local community in the city of Jerash.

1.6 Difficulties and obstacles faced in the research:

It is a fact that there are various challenges involved in any kind of research work; however, the very existence of such challenges provides the impetus to overcome them, and take the questions to higher levels. While carrying out this research the author dealt with various difficulties that can be sorted into the following:

1. *Difficulties related to scientific resources:*

   As mentioned previously, there has not been a great deal of research carried out into the tourism industry of Jordan, despite the impact of the tourism sector upon the national economy. Moreover, the lack of availability of accurate statistics and information, particularly in relation to the number of tourists that visit Jordanian tourist destinations, proved to be a bit of an obstacle. Indeed, the scarcity of information is related in most cases to the fact that the figures for the total number of tourists visiting a place tend to come from the number of entrance tickets sold at the archaeological sites and museums in the area, whether this be Petra, Jerash, Amman, or wherever. This method may actually be fairly reliable in the case of Petra, Jerash, and Ajloun, where tourists have to buy entrance tickets to get into the sites, but in other cases such as the Dead Sea, Amman, Wadi Rum, Aqaba, this method does not give accurate numbers because tourists can get into some of the sites without having to buy the entrance tickets that are used to create the statistics. Even other sources of data are not that reliable, for instance hotels and the figures from other tourist-related companies and businesses do not really give all the

[1] *Hejazeen, Emad, Tourism and Local Communities in Jordan : perception, attitude, and impacts, Munchen; Wien, 2007.*

[2] *Khasawneh, abd-Alkareem; Tourism and local community in the city of Jerash; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1998.*

necessary indicators on the tourism industry. In addition, serious problems were faced due to the multiplicity of public references in the tourism fields. Thus, the information was quite scattered and dispersed between MOTA, JTB, ASEZA, Central Bank, The Statistics Directorate, Petra Region Authority, and other bodies.

2. Logistical difficulties:

These difficulties were basically to do with some of the geographic considerations where the author chose five Jordanian destinations to be the work fields of the research. Of course, this choice meant a lot of travel between the five different destinations in order to conduct interviews and carry out questionnaire surveys amongst the tourists themselves.

3. Organisational difficulties:

These problems occurred when the researcher wanted to interview experts, public administrators, and investors, yet it was difficult sometimes to get an appointment either due to their other commitments, or simply due to their lack of interest in the research topic.

4. Many tourists at the tourist sites were unwilling to fill in the questionnaire, and they were always in a hurry. This situation forced us to go to the hotels and restaurants and find tourists there who would be willing to complete the questionnaire. In many cases their tour guides proved invaluable by urging the tourists to fill in the questionnaires.

5. Some officials and administrators, particularly in the public sector but sometimes also in the private sector, were not very collaborative with respect to statistics or studies that they held on the tourism sector in Jordan. Therefore, we were frequently obliged to turn to their heads of department in order to get permission to get access to this information.

Chapter Two

Conceptual Background

(Resources, Services, and Tourism in The Third World)

2.1. Resource-based Theory (RBT):

Studying current and potential resources is a very useful way to define work strategies and plans, and depending on the characteristics of these resources we can choose the adequate competitiveness enhancement and marketing policies which lead, as a result, to increase the profitability rates.

In this sense, Grant (1999) considers the analysis and study of resources, identifying both the weaknesses and the strengths, and specifying both the opportunities and the threats to be together the first step towards a holistic comprehension of the actual situation of any firm, organization, or destination.

The second step according to Grant is a global analysis of the real capabilities involved in the process of the exploitation of resources, and then studying the competitive advantage and to what extent it is able to generate significant returns on these current or potential resources.

In the final phase should be implemented the adequate strategies that match the nature of the resources and their capabilities, bringing to light as well the resources which are lacking, so that this resources gap can be addressed[1].

Other scholars (Bates and Flynn[2], 1995; Barney[3], 1995; Oliver[4], 1997; Mahoney[1], 2001, Barney[2], 2001; Barney[3], 1991; Peteraf[4], 1993) found a strong link between resources and

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[1] Zack, Michael H., Knowledge and Strategy. Butterworth Heinemann, 1999, p. 4.

[2] Bates, K.A., and Flynn, E. J., Innovation history and competitive advantage: A resource-based view analysis of manufacturing technology innovation, Academy of Management Journal 1995. p. 235-239.

[3] Barney, J.B., Looking inside for competitive advantage, Academy of Management Executive, 9, 1995, p. 49-61.

[4] Oliver, Christine, Sustainable competitive advantage: Combining institutional and resource-based views, strategic Management Journal, Vol. 18, No. 9, 1997, p. 697-713.

and competitive advantage, while others (Barney[5], Della Corte, Sciarelli), tried to explore Resource-based Theory, raising questions in relation to "Value", "Rareness", "Immitability", and "Organization".

As a matter of fact, the availability of resources in any tourist destination is an influential factor in the degree of the product competitiveness, provided that services and facilities are present, and that they work in harmony with the real needs of the global tourist system, because the tourist destination is made up of players covering a number of different dimensions, (natural, environmental, economic, and even human ones)[6].

Rodriguez-Diaz and Espino-Rodriquez (2007) point that a tourist site needs not only the geographic, natural, cultural, and social components, but also the basic elements that lead it to realise a competitive tourist destination. These elements are presented in the "Holistic Model" and they include general policies, public administration, infrastructure, the supply chain (which includes airlines, hotels, complementary services, and so on), and finally, the clients or tourists[7].

Underlying the interactive nature of the relationship between tourism and available resources, Britton (1990) explains how some kinds of tourism are exhausting the available resources by misuse. While tourist resources, on the other hand, already

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[1] Mahoney, Joseph T., A resource-based theory of sustainable rents, Journal of Management, Vol. 27, No. 6, 2001, p. 651-660.

[2] Barney, J.B., Resource-based theories of competitive advantage: A ten year retrospective on the resource-based view, Journal of Management, Vol. 27, No. 6, 2001, p. 643-650.

[3] Barney, J., Firm Resources and Sustained Competitive Advantage, Journal of Management, Vol. 17, No. 1, 1991, p.p 99-120.

[4] Peteraf, Margaret A., The cornerstones of competitive advantage: A resource-based views, strategic Management Journal, Vol. 14, 3, 1993, p. 179-191.

[5] Barney, J.B.; Della Corte, V; Sciarelli, M; Strategic Management Research at Crossroads: Resource-based Theory and Its Managerial Implications, unpublished article.

[6] Farrell, B.H., and L. Twining-Ward, Reconceptualising Tourism, Annals of Tourism Research, 31 (2), 2004, p. 274-295.

[7] Rodriguez-Diaz, Manuel; Espino-Rodriguez, Tomas F.; A model of Strategic Evaluation of a Tourism Destination Based on Internal and Relational Capabilities, Journal of Travel Research, 46.4, 2007, p.p. 369-381.

contribute to increasing the competitiveness of the area and to stimulating its economic development[1].

In this sense, Gonzalez and Falcon (2003) redefine destination resources to bring together not only attractions and natural resources, but also facilities, cultural attractions, (such as museums, cultural festivals and events, traditions, and so on), and skilled manpower[2].

While Butler (1997) warns of the negative impact of the increasing tourist demand on services and facilities in tourist sites, causing a growing use of natural resources, he calls upon all concerned parties to control their activities in order to avoid destroying and exhausting these resources[3].

In fact, tourist resources and services were mostly combined in the tourist studies. In his study, Leiper (1979) points out a number of elements that interact within the tourist activity. Among these is the tourist who tries to enrich his experience, and so needs a lot of subsidiary facilities. While resources, on the other hand, represent the suitable environment in which the tourist can satisfy his needs within the context of the tourism industry.

Moreover, Leiper sees that the tourism system is based on six basic sectors which overlap, these sectors being: tourist attractions, carriers, accommodation, marketing, miscellaneous services, and laws and regulations related to tourism[4].

Finally, one researcher (Della Corte; 2000) pointed out the necessity of seriously considering the site itself in relation to tourism planning in view of the fact that the area around the site itself is a very significant element of any development strategy, shedding

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[1] *Britton, S., Tourism, Capital, and place: towards a critical geography of tourism, Environment and planning: Society and Space 9 (4), 1991, p. 451-478.*

[2] *Gonzalez, Arturo Melian; Juan Manuel Garcia-Falcon; Competitive Potential of Tourism In Destinations, Annals of Tourism Research, Vol. 30, No. 3, 2003, p. 720-740*

[3] *Wahab, Salah; and J.J. Pigram, Tourism, Development and Growth: The challenge of Sustainability, Routledge, 1997, p. 109-128.*

[4] *Leiper, Neil; The Framework of Tourism: Towards a definition of tourism, tourist and the tourist industry, industry, Annals of Tourism Research 6 (4), 1979, p. 390-407.*

light on the necessity of intelligent destination management that takes care of all of the resources of the site[1].

According to this view, the Local Tourism System (LTS) is composed of three basic elements namely, the site, the tourist supply and facilities, and finally, the local system that governs the tourist supply. However, these three elements should work in a harmonious and coordinated way in order to present a qualified and competitive product in the tourist markets[2].

2.2. Tourism in the Middle East:

The area known as the Middle East extends east-west from Iran to Morocco, and north-south from Turkey to Sudan, Saudi Arabia, and Yemen. Most of the Middle Eastern countries gained their independence in the mid-twentieth century after a long period of colonisation and mandate in which the Arab world was divided and governed by British, French, Italian, and Spanish occupation forces.

In this context also emerged the Arab-Israeli conflict in 1948, exhausting Middle Eastern resources which went on militarisation, particularly in the Arab countries that bordered with the Israeli forces, as they had to keep their military power ready for any emergency. Therefore, there was an arms race in the whole of the region, with the possession of weapons regarded as a priority, to the neglect of development requirements and projects which were then of only secondary importance[3].

Some of the Middle Eastern countries such as Algeria, Bahrain, Iran, Iraq, Kuwait, Libya, Oman, Qatar, Saudi Arabia, and the United Arab Emirates rely on oil to cover their economic needs, while others like Morocco, Tunisia, Israel, and Syria are classified as diversified economic base countries. On the other hand, many of the countries of the Arab world, such as Algeria, Egypt, Morocco, Sudan, Tunisia, and Yemen; resort to the

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[1] *Della Corte, V.; La Gestione dei sistemi Locali di offerta turistica, Cedam, Padova, 2000.*

[2] *Sciarelli.S (2007), "Il management dei sistemi turistici locali: Strategie e strumenti per la governance" Giappichelli Editore – Torino.*

[3] *Henry, Clement M.; and Robert Springborg; Globalization and Development in the Middle East, Cambridge University press, 2001, p. 8-10*

export of manpower, receiving in return tremendous incomes that feed their economies and increase foreign exchange earnings.

As for the per capita *income rates in the Middle East and North Africa (MENA), the International Monetary Fund identified Egypt, Mauritania, Somalia, Sudan, and Yemen as low income countries, others like Algeria, Bahrain, Djibouti, Iran, Iraq, Jordan, Lebanon, Libya, Syria, Morocco, Oman, Saudi Arabia, and Tunisia as middle income countries, and Kuwait, Qatar, the United Arab Emirates, and Israel as high income countries*[1].

As a matter of fact, these very conditions related to the political conflict as well as to the economic structure of the MENA countries, and thus influenced the tourism industry, making it subject to political and economic changes. Moreover, the tourist flow to the MENA region is heavily dependent on the stability of the region, such that tourist numbers were varying according to the political atmosphere of the region which is considered to be one of the hottest conflict areas in the world.

The continuous crises and wars in the region such as the Arab-Israeli wars, the civil war in Lebanon, the First Gulf War (between Iraq and Iran), the Second Gulf War (Iraq and the Allied countries led by the USA), the First and Second Palestinian Intifada, and finally the invasion and occupation of Iraq, made the MENA area unstable and undesirable.

In addition, these conflicts have created a negative destination image for the whole of the Middle Eastern area, even though many of the countries have not been directly involved in the conflict. For example, countries such as Egypt, Israel, Turkey, Jordan, and the UAE underwent a decrease of incoming tourists during the Gulf War despite the fact that the war was not being waged in these countries[2].

However after the signing the Oslo Treaty between the Palestinians and Israel, and the Wadi Araba Treaty between Jordan and Israel, the tourist flow to the MENA area grew

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[1] *El. Erian, Mohamed A.; Sena Ekeni; Susan Fennell; and Jean-Pierre Chauffour, Growth and Stability in the Middle East and North Africa, International Monetary Fund, 1996, p. 2*

[2] *Schcider, Ingrid; and Sevil Sonmez, Exploring the touristic image of Jordan…mentioned ref. p. 540*

increasingly in the period 1994-1995, and some destinations gained significant successes in attracting tourists, in particular, Jordan, Egypt, Israel, and the Palestinian Territories.

Unfortunately, this progress in the tourism industry did not last very long because then war erupted between Lebanon and Israel in April 1996, causing the cancellation of hotel bookings and flights, and the cancellation or postponement of many tourist packages to the Middle East[1].

With the end of Lebanese-Israeli War, tourists started to come back to the region, but the situation deteriorated dramatically with the outbreak of the Second Intifada as a consequence of Israeli Prime Minister Sharon entering the Al-Aqsa Mosque in Jerusalem, provoking anger in the Palestinian territories and also in the Arab world.

Then, there were the dramatic events of 11th September 2001 followed by what is known as "The War on Terrorism", and these events paralysed the tourism industry worldwide in general, and in the Middle East in particular[2].

Saying that, it is necessary to underline that the effects of political instability on the tourism industry in the MENA area was not on the same level in all Middle Eastern countries. For instance, countries like Turkey, Tunisia, and Morocco were less influenced than others, due to the fact that these countries are not geographically close to the areas of conflict.

However, tourism passed through various development phases according to the economic circumstances. For the most part, countries in the MENA area did not pay enough attention to this sector, and did not regard it as an important component of the national economy, while most investment in facilities and services was made by public enterprises, whereas the contribution of the private sector was weak and marginal.

Only by the 1980's and 1990's did the MENA countries start to attach more importance to the tourism industry, enacting laws and regulations that aimed to encourage the private sector to get involved in investing in tourist activities. Furthermore, countries like

[1] *Haddad, Muhanna; Jordan and tourism,... previous mentioned reference, p. 60.*

[2] *Steiner, Christian, Political Instability, Transnational Tourist Companies and Destination Recovery in the Middle East after 11/9, Tourism and Hospitality Planning and Development, Vol. 4, Issue 3, 2007, p.p. 169-190.*

Tunisia, Morocco, Jordan, and also Syria (which was slower than the others), implemented privatisation strategies and plans which permitted the private sector to own and manage several services.

With this new economic interest in tourism, many initiatives were undertaken to enhance it, such as the Shopping Festival in Dubai, sporting events hosted in Qatar and Bahrain, political conferences held in Sharm el-Sheikh (Egypt), Petra and the Dead Sea (Jordan). Such new initiatives aimed to give some good publicity to these tourist destinations[1].

According to the WTO's vision by 2020, the Middle East is expected to attract more tourists, with the number of tourists hopefully rising by 7.1%, and the region's share of the international tourist market hopefully exceeding 4.4% by 2020[2].

2.3. Tourist Destination Management:

Destination management style is an important factor in the degree to which a tourist destination is competitive. Thus, it is essential to have high level of coordination between the various stakeholders in the tourism industry, namely, resources, accommodation, restaurants, handicraft shops, means of transport, and other complementary services, in order to penetrate the international tourist markets, offering a strong and integrated product.

The destination management concept implies that all strategies and policies related to the tourist site, such as the relationship between the private and public sector and their coordination level, the promotional strategies and to what extent the image is known, domestic and foreign investment in the tourism sector, control of tourist service quality, networking between tourism industry stakeholders, local community inclusion, and the requalification of tourism manpower by the implementation of training programmes[3].

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[1] *Hazbun, Waleed, A New Agenda for Tourism Development in the Arab World, "The Arab World in the 21st Century" Conference, Cairo, 2003, p.p. 2-7.*

[2] *WTO, World Tourism Organization, Tourism 2020 Vision: Long Term Forecast.*

[3] *Gomezelj, Doris Omerzel; and Tanja Mihalic; Destination Competitiveness-Applying different models, the case of Slovenia, Tourism Management, Vol. 29, Issue 2, 2008, p. 294-307.*

Many scholars (Wanhill, Fletcher, Fyall, Gilbert, Laws, Cooper[1] 2005, Scott and Parfitt. 2002, Crouch and Ritchie[2], 1999; Della Corte, 2000), underline the importance of organisational and managerial dimensions in the tourist site development process, representing a fundamental step towards the enhancement of product attractiveness.

It seems certain that the role of the public sector, played by various public bodies and entities, provides the cornerstone of tourist destination management along with the enactment of laws and regulations, in addition to the decision making process. However, the efficiency of the public sector in the management of tourism depends upon the coordination level between the decision makers in order to reduce the bureaucratic procedures that have a tendency to interrupt the flow of getting things done and to weaken the enthusiasm and the will to work[3].

2.4. Tourism impact:

2.4.1. Economic impact of tourism:

As mentioned previously, the tourism sector contributes greatly to the economy of most countries, surpassing the traditional sectors such as agriculture and industry by gaining significant weight in the GDP.

Moreover, tourism has a specific economic impact in the Third World countries where high costs often impede the presence of governments in economic development fields, thus they resort to developing the tourism industry by encouraging foreign and local investors to take the initiative, attracting tourists to visit, and making available abundant job opportunities[4].

It is clear that the tourism industry is a double-edged sword regarding economic impact. On the one hand, tourism requires an adequate level of infrastructure, transport, and

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[1] Cooper, Christopher p., chris cooper, David Gilbert, John Fletcher, Stephen Wanhill, and Alan Fyall; Tourism: Principles and practice; Financial Times prentice Hall, 2005.

[2] Crouch, Geoffrey I., and J.R. Brent Ritchie; Tourism, competitiveness, and Social Prosperity; Journal of Business Research, Vol. 44, Issue 3, 1999, p. 137-152.

[3] Elliott, James; Tourism: politics and public Sector Management; Routledge; 1997, p.p. 2- 10.

[4] Mbaiwa, Joseph E., The Socio-economic and environmental impacts of tourism development on the Okavango Delta, north-Western Botswana, Journal of Arid Environments, 54, 2003, p.p. 447-467.

recreational facilities, that serve to prolong the tourist's length of stay. However these requirements place public resources under pressure in a situation where budget is usually limited as well as being oriented towards other national priorities. When, on the other hand, the positive economic impact of tourism includes various foreign exchange earnings and the hiring of local manpower, this leads to an increase in rates of income along with an improvement in the local standard of living, and thus a change in lifestyle and opportunities for local people as a result of the benefit of tourism returns[1].

Obviously measuring the economic impact of the tourism sector is not easy, and it is difficult to get accurate statistics because of the complex multidimensional structure of the tourism industry, which involves transport, travel agencies, hotels, restaurants, and a number of other industries.

However, according to international studies, tourism contributed 6% to the total world exports (including both goods and services), while it exceeds 30% of total world exports if we take only the service sectors. Moreover, the increasing number of tourists travelling considerably augmented the income that is generated from the tourism industry as well as its contribution to the Gross Domestic Product (GDP), (see Figure No. 4).

The WTO's vision for 2020 is that international arrivals reach 1,561 billion by this time, compared with 565 million in 1995, while total international tourist receipts are expected to reach US$ 2000 billion by 2020 compared to US$ 401 billion in 1995[2].

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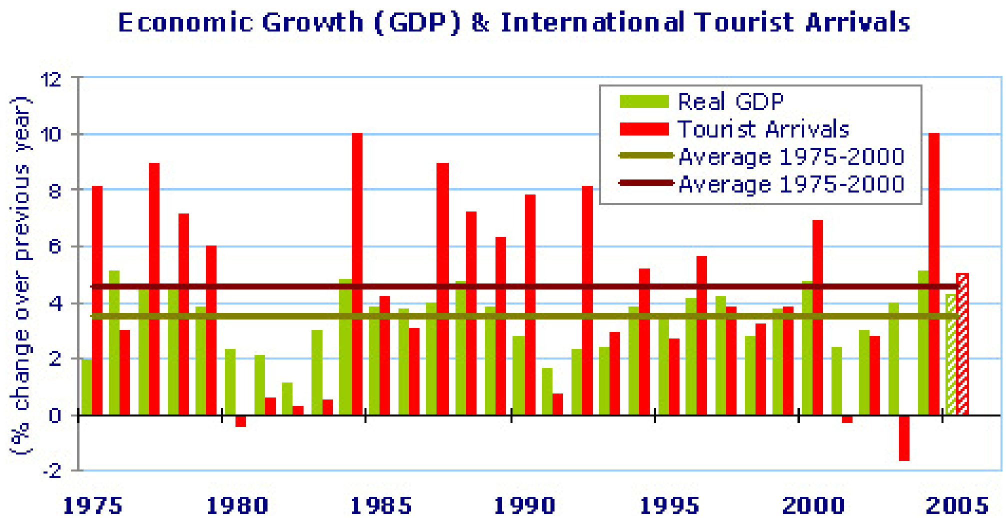
[1] *Sinclair, M. Thea, Tourism and Economic Development, Journal of Development Studies, 34: 5, 1998, p.p. 1-51.*

[2] *WTO, Tourism 2020 Vision; global Forecast and Profiles of Markets Segments, Vol. 7, 2001.*

Figure No.4



Source: World Tourism Organization; International Monetary Fund[1]

2.4.2. The Socio-cultural Impact of the Tourism Industry:

Besides its economic contributions, the tourism industry has also contributed a great deal to cultural and social fields. Visiting places that are a long distance from home, tourists have the opportunity to see new cultural, social, and religious realities which are different to what they are used to. In this sense, travelling helps to bridge the socio-cultural gap between the peoples of world, overcoming xenophobia and negative prejudices, enriching dialogue and helping to create a spirit of mutual understanding[2].

Tourism has a great influence on cultural and social values through the direct contact that takes place between tourists and locals where both parties give and take reciprocally. Undoubtedly, the degree of influence depends on the frequency of contact

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[1] *WTO, Facts and Indicators about Tourism and the World Economy, 2005.*

[2] *Higgins-Desbiolles, Frya; More than an "Industry": The Forgotten power of tourism as a social force, Tourism Management, 27, 2006, p.p. 1192-1208*

between the two parties, so that as tourists meet and interact with local; their exchanging of values becomes more significant.

Moreover, tourism is not simply a leisure activity, but it contributes also to the settlement of conflict, and even helps to resolve religious and cultural crises, this role being played in Eastern and Western Germany when tourism helped to reduce the hatred between the two sides. In Lebanon, considering tourism as the main economic resource, the Lebanese people have become more interested in political stability in order to avoid the negative consequences of wars and catastrophes resulting from the absence of a peace horizon[1]*.*

In addition, seeing diversity to be the spring of human creativity in the world, tourism gives the chance to those who are travelling to be aware of the fact that the world is diversified in such a manner that each part becomes necessary and integral.

On the other hand, the interest that tourists develop in traditional textiles, handicrafts, and other local handmade things motivates many local people to take more care of their cultural heritage as it becomes attractive to tourists. This is, of course, more significant in the developing countries where the culture and traditions of the local people are strongly present in their tourism product[2]*.*

Although tourism enriches these cultural and social aspects, it has also some negative impacts in that sometimes it is seen as a threat to the local culture, and even to social stability. Cultural identity is the first thing to be concerned about, especially in the case of small cultural, social, or religious minorities that are already risking their identities with the new globalisation instruments and tools that aim to in some way break various sociocultural and economic barriers[3]*.*

In Arab and Muslim societies many people fear the spread of undesirable behaviours that tourism may bring as this would be in conflict with Islamic concepts and rules, examples of these behaviours being sexual relationships outside of marriage, the drinking of alcohol, gambling, and drug taking. Other societies are concerned about the tourism

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[1] *Brown, France; Tourism reassessed; Blight or Blessing?, Butterworth, 2000, p.p. 9-10.*

[2] *Alrawadieh, Ziad; Tourism Impact on the dialogue between cultures, unpublished paper.*

[3] *Greig, J. Michael; The End of Geography: Globalization, Communications, and culture in the International system, The Journal of Conflict Resolution, Vol. 46. No. 2, 2002, p.p. 225-243 .*

industry, because they see their cities becoming overcrowded and polluted as a result of it in such a manner that exceeds the carrying capacity of the tourist destination itself[1].

[1] *Brayley, Russ; Pautine Sheldon, and Turgut Var; Perceived Impacts of Tourism by Residents; Annals of Tourism Research, Vol. 17, Issue 2, 1990, p.p. 285-289.*

Chapter Three

The Tourism Industry in Jordan

3.1. The general view of the tourism sector in Jordan:

Nowadays, tourism is one of the vital economic sectors in Jordan, having experienced a rapid growth particularly in the last two decades. This growth made tourism a fundamental cornerstone of the national economy as it is a rich resource for foreign exchange earnings, and job opportunities. Before the 1990's, Jordan was not especially concerned with tourism since the tourist flow coming to Jordan was not so significant. The scarcity of tourist movement, of course, was related to the political situation in the Middle East which was characterised as unstable and insecure because of the Arab-Israeli conflict, the Gulf Wars, and Lebanese internal political crises, giving a negative image for the whole of the Middle East region.

The launch of the peace process in Madrid followed by the signing of the Peace Treaty in Oslo between the Palestinians and the Israelis, and Wadi Araba Treaty between Jordan and Israel marked a historical event in terms of Jordanian tourism. The total arrivals to Jordan rose in the years between 1993-1998 by 62.1%. Despite this great increase in the number of tourist arrivals, the growth of bed occupation rates in Jordanian hotels was very low considering the number of tourists. Bed occupation increased only by 1% as a consequence of the one day visit policy adopted by some Israeli tour operators to attract tourists to Israel by adding some Jordanian attractions, particularly Petra and Wadi Rum, to the tourist packages. Thus many tourists were crossing the Jordanian borders, by means of the Wadi Arab and Jordan Valley Crossings, every day in the morning to visit Jordanian destinations, and then returning in the evening. Indeed, this kind of tourist, who represented about 22% of tourist arrivals by 1997, was not benefitting the Jordanian economy at all, according to many experts. They were even bringing in their own water bottles, and spending at the tourist sites usually nothing more than the cost of the entrance tickets[1].

[1] University of Mut'ah; Jordan and tourism: challenges and visions; the Centre of South for Studies and Continuous Training, Mut'ah; 2000; p. 13-16.

By the late 1990's tourism had grown very rapidly and occupied a significant position among the economic sectors, contributing strongly to the Jordanian GDP. Actually, the tourism growth rate average in recent years has increased by 7%, and its contribution to the GDP has exceeded 11%. Gradual progress has taken place over time, except for some periods in which tourism witnessed a decline, particularly in the years between 2000-2002 when there was a decline of 8%. This decline was mainly the result of the political instability of the region. However, by the end of 2002, tourism returned to normal, subsequently generating over one billion dollars for the Jordanian economy by 2004[1].

By 2006, tourism was continuing its growth trend where 6.6 million arrivals were recorded, which was 13.8% more compared with the previous year, with 48.5% of these being overnight tourists, while the tourist receipts grew to more than 1.164 billion dollars, contributing 13.2% of the GDP. Furthermore, the number of jobs created by tourism in Jordan increased by 5.8%[2].

The Jordanian government also started to pay more attention to the tourism sector as its contribution to the national economy grew continuously. As well as this interest from the government, some national institutes and foreign agencies launched academic efforts, among them the American Agency (USAID) and the Japanese Agency (JICA). In fact, the study conducted by JICA, in the years 1994-1996 on tourism in Jordan, was very important since it highlighted the necessity to work out specific projects, which later were implemented when the Jordanian government decided to develop four tourist destinations, namely Amman, Salt, Karak, and the Dead Sea, with the support of the Japanese government, and yet other projects were financed by USAID to improve certain tourist and archaeological sites, by raising the level of quality of the services[3].

Moreover, the government has tried to encourage the private sector to play a part in the global privatisation process which has been applied since the end of 1980's, shifting the property of many of the tourist projects to the private sector. Government policy brought

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[1] Raid , Margaret and William Schwab , Barriers to sustainable Development: Jordan's sustainable Tourism strategy, Journal of Asian and African Studies , Vol. 41(5-6), 2006, p. 439-457 .

[2] Jordan Central Bank; Annual Report, 2006; p.12.

[3] Tanaka et al. ; previous mentioned resource, p 3.

huge local and foreign investments for the tourist sector, particularly in Amman, Aqaba, Petra, and the Dead Sea, that benefitted from the incentives and privileges that were available, especially those included in the Investing Law.

Three projects benefitted from about JD 243 million as a result of Investing Law incentives in 2006, while the total benefit from this law during 2005 was about JD 71.6 million over 15 different projects[1].

Besides the privatisation process, Jordan sought to adjust and strengthen the relationship between the public and private sector by building a strategic partnership that brings together a number of ideas and visions to enhance the whole Jordanian economy generally, and the tourism sector in particular. To realise this partnership, Jordan launched the Jordan Tourism Board (JTB) that draws together the public and private sectors, attempting to bridge the gap between them.

From its outset, the JTB has taken the responsibility of marketing and promoting the Jordanian product in the international markets, and it inaugurated, for this purpose, several agencies and offices worldwide. In addition, the JTB carried out different studies on the Jordan tourist sector in cooperation with USAID and MOTA, and created the Jordan tourism strategy for the period 2004-2010[2].

By 2000, Jordan had launched the Aqaba Special Economic Zone Authority (ASEZA), which gave investors the opportunity to benefit from a number of economic privileges. In relation to this, Article No. 9 of ASEZA law gives the authority several responsibilities including:

- *to develop the Aqaba Special Economic Zone and to launch a comprehensive requalification process to create an adequate investment environment*
- *to create job opportunities for Jordanians*
- *to involve the private sector in the development process*
- *to guarantee fair competition*

[1] Jordan Central Bank; Annual Report, 2006.

[2] USAID, Jordan Competitive Comparative study, mentioned resource .

- *to protect the environment*[1].

Actually, ASEZA was able to attract more than 8 billion dollars in the first seven years, most of this being to the tourism sector such as the Tala Bay project on the southern beach, international hotels, a marine park, shopping centres, and a marina.

In Petra, in the south of Jordan, the government launched the Petra Region Authority to deal with the development of tourism there. The PRA was under the control of MOTA at the beginning, then it became independent and connected directly to the Council of Ministers, with wide-ranging responsibilities regarding the improvement of the city of Petra, and infrastructure development concerning roads and other public services.

In fact, the PRA made remarkable achievements with respect to the infrastructure level in the first few years, and many locals in the city were relying on the PRA to make changes. Unfortunately, the PRA did not fulfill these expectations, according to many observers, and the expectations of the locals have been frustrated by the decline of the PRA.

By 2007, the government had created Petra Archaeological Park (PAP) as a public entity that covers more than 264,000 square metres located in the archaeological part of Petra. PAP is connected to MOTA with regard to administrative and technical issues.

As has been noted, there are several public entities that are dealing with the tourism industry in Jordan: The Ministry of Tourism and Antiquities (MOTA), the Jordan Tourism Board (JTB), Petra Region Authority (PRA), Petra Archaeological Park (PAP), Aqaba Special Economic Zone Authority (ASEZA), Jordan Valley Authority, and other bodies with duties that are related directly or indirectly to the tourism sector.

However, the main tourist destinations of the Jordanian product are:

1. *Petra: the most remarkable tourist site in Jordan, which attracts cultural, historical, and archaeological tourists.*
2. *Jerash: one of few well-preserved Roman cities, distinctive for its theatres and roads surrounded by decorated columns. Jerash attracts cultural, historical, and archaeological tourists.*

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[1] *ASEZA Law no 32/2000, published in the Official Gazette issue no. 4453.*

3. *Amman: the capital of Jordan, which has various archaeological monuments that represent the different historical periods; of these monuments the Roman Theatre and the Castle (Alqala'a) are notable. Amman attracts various categories of tourist, but in particular, cultural and archaeological tourists, conference attendees, and recreational tourists.*

4. *Umm Qais: an archaeological city in the north of Jordan which attracts cultural, historical, and archaeological tourists.*

5. *Aqaba: one of the most important cities in Jordan due to the fact that it is the only Jordanian city on the coast. Aqaba did not initially attract that many tourists, but then it prospered significantly after it was launched as a special economic zone. Tourists come here mainly for recreational tourism, shopping, and beach tourism.*

6. *Desert Castles: such as Al-Mashta, Qusair Amra, and other castles that are part of Islamic history, and so attract those who are interested in historical tourism.*

7. *The Dead Sea: this became an interesting tourist destination because of its unique characteristics that distinguish it from other seas around world, especially due to the fact that it is the lowest place in the world. Moreover, the Dead Sea has a curative value for dermatitis, rheumatism, and other diseases. It attracts recreational tourism, conferences, and beach tourism.*

8. *Historical castles in Karak, Shoubak, and Ajloun: these castles are very important for historical tourism.*

9. *Wadi Rum: this site has its place in the tourism industry of Jordan due to its fascinating nature as well as being close to the city of Petra and the Gulf of Aqaba, thus attracting natural, environmental, and camping tourism.*

10. *Madaba, Nebo Mountain, and Baptism site: these sites are very important for religious Christian tourists.*

11. *Islamic sites in Northern Mazar, Southern Mazar, Mutah, and various other places, which attract religious Muslim tourists*[1].

The Ministry of Tourism, together with other public bodies such as ASEZA and PRA, has made every effort to improve these destinations in order to attract tourists as well as being capable of satisfying their needs. In addition, the Ministry of Planning, with the support of foreign countries and international agencies, has played an important role in the development of these tourist sites by doing some projects within the National Development Master Plan 2004-2006, (see Table No.2).

[1] *Al-Roudan, Ubaid; Fawzi Alsadeq; and Tala't Albdour; Economics of tourism in Jordan: basic services and marketing; The royal scientific society; Amman; 2000; p. 44-67.*

Table No.2: Tourist projects included in the national economic and social development master plan (2004-2006)

Project	***Cost (JD)***			
	Total	***2006***	***2005***	***2004***
Tourism sector development project/ Phase Two	*5.128*	*0.000*	*1.028*	*4.100*
Tourism sector development project/Japanese loan	*39.815*	*17.158*	*17.157*	*5.500*
Protection and promotion of heritage	*3.800*	*1.267*	*1.267*	*1.266*
Sweima Park	*1.254*	*0.000*	*0.000*	*1.254*
Tourism Development Strategy	*0.100*	*0.000*	*0.000*	*0.100*
Exploring the role of the private sector in the management of archaeological sites	*0.030*	*0.000*	*0.000*	*0.30*
Restoration and documentation of the ruins at Al-Faidan site	*0.067*	*0.000*	*0.000*	*0.067*
Al-Humaima visitors centre	*0.136*	*0.000*	*0.00*	*0.136*
Developing Ma'an Gardens	*0.200*	*0.000*	*0.000*	*0.200*
Renovation of houses surrounding Al-Sele' visitors centre	*0.300*	*0.000*	*0.200*	*0.100*
Restoration of Umm Qais Monuments	*0.090*	*0.000*	*0.000*	*0.090*
Excavation and restoration in the Castle "Alqala'a" - Amman	*0.180*	*0.000*	*0.000*	*0.180*
Restoration of Ajloun castle and Mar Elias	*0.60*	*0.000*	*0.000*	*0.60*
Developing Burqush site	*0.035*	*0.000*	*0.000*	*0.035*
Developing the area surrounding Ajloun castle	*0.250*	*0.000*	*0.150*	*0.100*
Improvement of Hemmet Abu Dhableh site	*0.200*	*0.000*	*0.150*	*0.050*
Lighting Ajloun castle	*0.015*	*0.000*	*0.000*	*0.015*
Tourist site road signs	*0.030*	*0.000*	*0.000*	*0.030*
Improvement of Umm Qais site	*0.470*	*0.000*	*0.400*	*0.070*
Creating a tourist market in Irbid downtown	*0.300*	*0.000*	*0.220*	*0.080*

area				
Furnishing Dar Al-Saraya Museum	*0.015*	*0.000*	*0.000*	*0.015*
Improvement of Al-Shallaleh quarter/ Ramtha	*0.150*	*0.000*	*0.100*	*0.50*
Building Lout Museum	*0.770*	*0.000*	*0.000*	*0.770*
Supporting Baptism site board	*0.300*	*0.000*	*0.000*	*0.300*
Restoration of some visitor centres	*0.070*	*0.000*	*0.000*	*0.70*
Developing tourist site management	*0.100*	*0.000*	*0.000*	*0.100*
Local awareness and tourism promotion campaign	*0.125*	*0.000*	*0.000*	*0.125*
Umm Al-Rasas site Management	*0.050*	*0.000*	*0.000*	*0.050*
Supporting JTB	*5.000*	*0.000*	*0.000*	*5.000*
Restoration of monuments in Jerash	*0.200*	*0.000*	*0.000*	*0.200*
Restoration of Karak castle	*0.070*	*0.000*	*0.000*	*0.070*
Excavations in the ruins of Alfadein, Safawi, Rehab, and Umm El-Jemal	*0.060*	*0.000*	*0.000*	*0.060*
Excavations in Umm Rasas and Allahoun	*0.060*	*0.000*	*0.000*	*0.060*
Excavations of Beit Ras and Queilbeh	*0.050*	*0.000*	*0.000*	*0.050*
Excavations of the Baptism site	*0.040*	*0.000*	*0.000*	*0.40*
Excavations of southern Aghwar	*0.050*	*0.000*	*0.000*	*0.050*
Excavation and restoration of Aqaba Castle and Ayla monuments	*0.070*	*0.000*	*0.000*	*0.070*
Excavation and restoration of Petra Archaeological Park	*0.150*	*0.000*	*0.000*	*0.150*
Building of a visitor centre at Alhalabat Castle	*0.200*	*0.000*	*0.000*	*0.200*
Increasing the number of women working in the tourism sector	*0.120*	*0.000*	*0.000*	*0.120*
Furnishing the museum of the lowest place in the world	*0.500*	*0.000*	*0.500*	*0.000*
Tourism sector development /Phase Three	*28.270*	*15.900*	*12.370*	*0.000*
Improvement of several parks	*0.700*	*0.200*	*0.250*	*0.250*

Increasing the number of tourist highway signs	*0.750*	*0.150*	*0.400*	*0.200*
Creating car parks at the archaeological sites	*0.700*	*0.200*	*0.250*	*0.250*
Lighting archaeological castles	*0.500*	*0.145*	*0.255*	*0.100*
Various infrastructure projects and tourist site management	*1.200*	*0.000.*	*0.000*	*1.200*
Developing Mar Elias site/Phase Two	*0.120*	*0.000*	*0.120*	*0.000*
Improving the Ain Abata site	*0.150*	*0.000*	*0.150*	*0.000*
Improvement of Al-Qatrana Castle	*0.250*	*0.000*	*0.250*	*0.000*
Burqush Cave site improvement	*0.250*	*0.000*	*0.250*	*0.000*
Developing Al-Berketein site	*0.100*	*0.000*	*0.100*	*0.000*
Karak Municipality Park	*0.300*	*0.000*	*0.300*	*0.000*
Afra and Burbeita site	*0.350*	*0.000*	*0.350*	*0.000*
Conference centre of Wadi Mousa	*0.3500*	*0.000*	*3.500*	*0.000*
Al-Shoumari Centre for Heritage Preservation	*0.600*	*0.000*	*0.600*	*0.000*
Promotional signboards on the highways (for Arabain Gulf tourists)	*0.416*	*0.000*	*0.000*	*0.416*
Supporting archaeological excavations	*8.000*	*0.5000*	*0.3000*	*0.000*
King Talal Dike Park	*0.230*	*0.200*	*0.030*	*0.000*
Public park- Karak	*0.130*	*0.100*	*0.030*	*0.000*
Improvement of companions of prophet tombs (Mu'tah, Mazar)	*0.130*	*0.100*	*0.030*	*0.000*
Almoujeb Reserve visitors centre	*0.130*	*0.100*	*0.030*	*0.000*
Furnishing Al-Mafraq Museum	*0.100*	*0.070*	*0.030*	*0.000*
Al-Mafraq Park	*0.030*	*0.030*	*0.000*	*0.000*
Uthreh site restoration	*0.030*	*0.000*	*0.030*	*0.000*
Al-Alouk tourist park	*0.225*	*0.150*	*0.075*	*0.000*
Shabeeb palace rehabilitation	*0.030*	*0.000*	*0.030*	*0.000*
Children's park – Na'our	*0.030*	*0.000*	*0.030*	*0.000*
Total	***107.901***	***40.84***	***43.632***	***23.429***

3.2. Tourist supply:

3.2.1. Accommodation:

The total number of both classified and non-classified hotels in Jordan is 474, offering more than 21,941 rooms in 2008 and about 42,764 beds, (see Table No.3).

Table No.3: Number of hotels in Jordan by category

Hotel category	**No. of Hotels**	**No. of rooms**	**No. of beds**
Five Star	23	5,753	10,066
Four Star	21	2,493	4,673
Three Star	45	3,175	6,334
Two Star	53	2,194	4,521
One Star	56	1,318	2,735
Total for hotels	**198**	**14,933**	**28,329**
Apartments B	22	1,078	1,833
Apartments C	90	2,705	5,337
Suites A	2	63	130
Suites B	10	336	630
Suites C	12	539	1,062
Total for apartments and suites	**136**	**4,721**	**8,992**
Unclassified Hotels	125	1,633	3,962
Hostels	2	14	36
Motels	1	11	18
Camping	12	629	1,427
Total unclassified	**474**	**21,941**	**42,764**

Source: Ministry of Tourism

Statistics and Information Dept.

Most of the hotels are located in the capital city Amman which has more than 322 hotels with 14,989 rooms and 28,552 beds. Actually, 177 of these hotel are classified and 132 hotels are non-classified, (See table no.4).

Table no. (4) Number of hotels in Amman

Amman	***No.of hotels***	***No of rooms***	***No of beds***
Five Star	*12*	*3,631*	*6,343*
Four Star	*15*	*1,744*	*3,279*
Three Star	*29*	*2,088*	*4,094*
Two Star	*33*	*1,330*	*2,645*
One Star	*28*	*724*	*1,463*
TOTAL	*117*	*9,517*	*17,824*
Apartments B	*22*	*1,078*	*1,833*
Apartments C	*87*	*2,594*	*5,007*
Suites A	*2*	*63*	*130*
Suites B	*10*	*336*	*630*
Suites C	*11*	*480*	*944*
TOTAL	*132*	*4,551*	*8,544*
Unclassified Hotels	*72*	*916*	*2,174*
Hostels	*1*	*5*	*10*
Total for Amman	***322***	***14,989***	***28,552***

Source: Ministry of Tourism

Statistics and Information Dept.

Aqaba is in the second position regarding the number of hotels. There are around 45 hotels that contain about 2,475 rooms and 5,246 beds. 28 of these hotels are classified while unclassified hotels account for about 14 hotels, (see table no.5).

Table no. (5) Number of hotels in Aqaba

Aqaba	***No.of hotels***	***No. of rooms***	***No of beds***
Five Stars	*2*	*490*	*804*
Four Stars	*2*	*305*	*564*
Three Stars	*7*	*544*	*1,200*
Two Stars	*9*	*568*	*1,235*
One Star	*8*	*155*	*362*
TOTAL	*28*	*2,062*	*4,165*
Apartments C	*2*	*97*	*302*
Suites C	*1*	*59*	*118*
Unclassified Hotels	*14*	*257*	*661*
Total for Aqaba	***45***	***2,475***	***5,246***

Source: Ministry of Tourism

Statistics and Information Dept.

In Petra, there are about 38 hotels, 26 classified and 12 unclassified, with a total capacity that exceeds 1,996 rooms containing over 3,845 beds, (see table no.6).

Table no. (6) ***Number of hotels in Petra***

Petra	***No.of hotels***	***No. of rooms***	***No. of beds***
Five Star	*6*	*758*	*1,381*
Four Star	*2*	*229*	*444*
Three Star	*7*	*436*	*842*
Two Star	*2*	*111*	*235*
One Star	*8*	*232*	*473*
Camping	*1*	*35*	*60*
TOTAL	*26*	*1,801*	*3,435*
Unclassified Hotels	*12*	*195*	*410*
Total for Petra	***38***	***1,996***	***3,845***

Source: Ministry of Tourism

Statistics and Information Dept.

As for the rest of the Jordanian cities there are only a few hotels, these being 4 hotels at the Dead Sea, 1 in Ma'een, 11 in Irbid, 3 in Ajloun, 7 in Karak, 3 in Jerash, 8 in Zarqa, 2 in Azraq, 10 in Madaba, 2 in Ruwaished, 1 in Fuheis, 4 in Ma'an, 3 hotels and 2 campsites in Tafileh, 1 campsite in Shoubak, and 7 campsites in Wadi Rum[1].

3.2.2. Restaurants:

The restaurant sector in Jordan is composed of two different categories: popular restaurants that offer a budget service to their clients, and tourist restaurants which are usually more expensive and observe most of the service quality criteria. The total number of tourist restaurants was about 675 in 2007, in comparison with 376 in 2002, most of

[1] Ministry of Tourism and Antiquities; Statistics and Information Dept.; 2008.

these being in the big cities. These restaurants are subject to periodic control that is conducted by several public authorities such as the Ministry of Tourism, the Ministry of Health, and other regional and local authorities.

3.2.3. Travel Agencies:

Indeed, travel agencies have prospered a great deal in the last few years. The number of travel agencies working in Jordan rose from 397 in 2000 to about 536 by 2007, and to over 563 in 2008. Most of these travel agencies deal with flight booking and ticket selling, as well as putting together tourist packages for incoming and outgoing tourists. Most of the travel agencies are in Amman, while the rest of them are distributed throughout the other big tourist cities, such as Irbid, Aqaba, Zarqa, and Petra, (see Table No.7). ***Table no. (7): Travel Agencies in Jordan***

Number of Travel Agencies								City
2007	2006	2005	2004	2003	2002	2001	2000	
444	376	368	368	340	327	306	338	Amman
28	31	27	27	28	23	19	30	Aqaba
20	10	13	30	25	20	7	10	Irbid
14	6	6	14	12	12	4	6	Zarqa
14	12	10	7	7	7	8	8	Petra
3	2	2	6	5	5	2	1	Karak
1	1	1	1	1	1	-	-	Ma'an
1	-	-	3	2	1	-	-	Balqa'a
-	-	-	-	1	1	-	-	Baqa'a
2	1	2	3	1	1	-	1	Rusaifeh
-	-	-	-	-	1	1	-	Ramtha
-	-	-	-	-	-	-	2	Fuheis
2	-	-	2	2	2	-	-	Jerash
1	1	1	-	-	-	-	-	Wadi Rum
5	1	1	2	-	-	-	-	Madaba
1	-	-	3	2	2	-	1	Mafraq
536	441	431	466	426	403	347	397	Total

Source: Ministry of Tourism and Antiquities

3.2.4. Rental car agencies:

Rental car agencies play an important role in tourist transport as some tourists, particularly those coming individually; prefer to rent a car instead of using tourist buses or the public transport that connects the various Jordanian tourist destinations. As seen in the Table No. (8), most of the rental car agencies are found in Amman.

Table No. (8): Rental car agencies in Jordan by 2007

No. of cars	No. of agencies	City
173	13	Aqaba
5,278	183	Amman
22	2	Ma'an/Petra
22	2	Ajloun
108	5	Irbid
30	3	Ramtha
141	9	Balga'a
110	9	Zarqa
10	1	Madaba
10	1	Mafraq
30	3	Jerash
5,934	231	Total

Source: Ministry of Tourism and Antiquities

3.2.5. Tour guides:

In the various Jordanian destinations, there are a number of tour guides who carry out the job of giving tourists information about sites they are visiting. Most of the tour guides *in Jordan can work in all the Jordanian destinations, but there are some who are authorised to work only at specific tourist sites.*

By the end of 2007 the total number of tour guides in Jordan reached about 678, most of these speaking English, while the rest specialise in other languages such as French, Italian, German, Spanish, Russian, Dutch, Portuguese, or other languages, (see Table No.9).

Table No. (9)

Tour Guides in Jordan 2007								
Total	***Others***	***Spanish***	***German***	***Italian***	***French***	***English***	***language***	***Category***
639	***151***	***47***	***67***	***61***	***76***	***237***	***Male***	***Local/National***
39	***17***	***3***	***1***	***0***	***1***	***17***	***Female***	
639	***151***	***47***	***67***	***61***	***76***	***237***	***Total males***	
39	***17***	***3***	***1***	***0***	***1***	***17***	***Total females***	
678	***168***	***50***	***68***	***61***	***77***	***254***	***Total***	
Resource: Ministry of Tourism and Antiquities								

3.3. Tourist Demand:

In general, tourist demand for the Jordanian product grew considerably in the 1990's, recording a continuous growth, except for some periods in which the growth slowed down as a result of the political crises.

To illustrate this, the total number of arrivals to Jordan had risen from 643,945 tourists in 1989 to 1,073,549 in 1995, and to more than 3,438,084 tourists by the middle of the 1990's, which was the period that witnessed some progress in the peace process between

Palestine and Jordan on the one hand, and the Israelis on the other. But by 2000, tourist arrivals slowed down again with only 2,700,165 tourists coming to Jordan. Indeed, in this period, between 1999 and 2001, Jordan faced a critical situation in relation to the tourism industry due to a succession of regional and international crises, starting from the outbreak of the Second Intifada and the tragic attacks of 9/11 in the USA that caused a decline in the Middle Eastern markets including Jordan. Actually, Petra, in particular, suffered a great deal due to these crises as a result of the high dependency of its economy on the tourism industry.

With the beginning of 2002, tourism started to recuperate, recording an increasing tendency on the part of tourists to visit Jordan and the Middle East with arrivals reaching around 2,292,544, and among these about 2,292,544 as overnight tourists and 2,384,474 as day tourists.

This positive trend continued in 2005 with 5,817,370 tourists, among these 2,830,784 overnight tourists and 2,986,586 day tourists.

2007 was a very significant year for the Jordanian product as Petra was selected by international vote to be one the New Seven Wonders of the World. The various competition phases and the declaration ceremony of the new wonders in Lisbon created wide publicity for Petra and for Jordan also, with more than 6,528,626 tourists visiting in 2007, among these 3,097,666 overnight tourists and 3,430,960 day tourists[1], (see Table No.10).

[1] *Ministry of Tourism and Antiquities; Statistics and Information Dept.; 2008.*

Table No.10: Tourist Arrivals in Jordan 1998-2007

Nationality	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Africa	36,937	35,295	24,478	25,012	6,071	4,941	7,510	11,034	14,526	13,768
America	105,385	110,790	111,028	62,930	73,213	91,037	131,844	157,935	199,120	208,378
East Asia & Pacific	62,609	62,040	54,672	38,401	61,008	61,895	84,828	90,598	115,457	131,006
South Asia	29,416	33,792	31,135	24,791	51,367	38,127	53,404	60,573	70,092	67,325
Europe	473,951	484,056	443,595	390,117	442,128	444,088	528,112	552,675	643,528	869,117
U. N.	7,644	6,920	6,433	7,901	11,699	10,377	9,190	6,694	6,190	3,876
Arab	2,429,884	2,159,862	1,676,188	2,104,084	3,602,943	3,521,300	4,274,687	4,407,379	4,760,142	4,485,102
JORDAN	292,259	338,799	352,636	380,832	428,588	427,941	497,081	530,482	903,749	750,054
Grand Total	3,438,086	3,231,554	2,700,165	3,034,070	4,677,018	4,599,706	5,586,656	5,817,370	6,712,804	6,528,625

Source: Ministry of Tourism and Antiquities

3.4. Tourist manpower in Jordan:

It is not a straightforward matter to count the exact number of jobs that tourism brings because of the interdisciplinary nature of the tourism industry, and the wide variety of different jobs it involves. Usually, it is possible to obtain statistics regarding the number of employees in certain areas, such as the hotel industry, tourist restaurants, tourist transport enterprises, handicraft shops, and so on, while on the other hand it is quite difficult to know the real number of jobs that have been created as a result of tourism in other sectors which are not directly related to tourism as such, but involve commercial activities in the tourist destinations. Nevertheless, many researchers have measured the indirect employment in the tourism industry by considering that tourism contributes to the labour market by 1.5-2 job opportunities for each bed. Others think that tourism offers 2-3 indirect job opportunities for each direct job opportunity in the hotel industry[1].

The direct job opportunities in the tourism sector accounted for about 34,455 vacancies in 2007 in comparison with 21,293 in 2002 and 23.544 by 2004. Looking at the various tourist activities, a significant number of these jobs are in the hotel industry and in restaurants.

In the hotel industry there are more than 13,193 employees corresponding to 38.2% of the direct tourist manpower[2]*. Most of these vacancies were offered by hotels located in Amman in which there are about 8,739 employees, while at the Dead Sea hotels there are 1567, in Aqaba 1379, and about 981 employees in Petra hotels, the rest of the employees being distributed throughout the other tourist destinations.*

Restaurants hire more than 13,472 employees, among these 11,008 in Amman, 1,306 in Aqaba, 380 in Irbid, and 222 in Jerash. While travel agencies have 3,408 employees, most of these in Amman, Aqaba, Irbid, and Petra. The rental car sector has 1,417 employees, with most of these working in Amman and Wadi Rum.

Tourist handicraft shops contribute 550 jobs to the labour market, 686 are tour guides, 613 are employees who work with camels and horses that are kept for riding, and these are mainly in Petra

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[1] *Ta'amneh, Shebli; The role of tourism in the economic development in Jordan, Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman; 2001; p.92.*

[2] *Jordan Central Bank, Annual report, 2006; p. 12.*

and Wadi Rum. There are 951 jobs with the tourist transport companies, 45 in diving centres, and finally 120 jobs in water sports services in Aqaba city[1].

❖ ***Foreign manpower in the Jordan tourism sector:***

Foreign employees in the tourism sector account for about 17.3% , most of them working in restaurants with about 33.8% of those who are working in Jordanian restaurants being foreigners, in particular from Egypt and Syria.

The percentage of foreign employees in diving centres is about 31.1%, hotels 9.4%, travel agencies 2.6%, rental car agencies 1.1%, water sport centres 5%, and the tourist transport sector 2.5%. However, in some other tourist sectors such as handicraft shops, 100% of the employees are Jordanians[2].

❖ ***The presence of women in the Jordanian tourism sector:***

Unfortunately, the tourism industry is not one of the economic sectors that attract women despite the high salaries and the good benefits that tourism usually offers in comparison with other similar sectors.

Indeed, most Jordanian women prefer to work in the public sector. Nevertheless, it is common to see women involved in some commercial activities and in the services sector as well. The educational and medical professions are seen as the best choices from the point of view of women, and these fields are also perceived as being more socially acceptable for women than professions in other areas[3].

The motivations behind this reluctance of women to work in the tourism sector are various, and in most cases spring from social traditions and religious beliefs that impede the employment of women, meaning that, in a sense, they are wasted resources[4].

The social reservations are basically related to the fear of negative behaviours that are associated with tourism activities, such as those which may contradict religious beliefs or social traditions, for

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[1] *Ministry of Tourism and Antiquities; Statistics and Information Dep.; 2008.*

[2] *Ministry of Tourism and Antiquities; Statistics and Information Dep.; 2008.*

[3] *Alrawadieh, Ziad; Golden triangular: Petra, Wadi Rum and Aqaba , previous mentioned resource; p. 75.*

[4] *Hejazeen, Emad, … previous mentioned resource; p. 203.*

example the drinking of alcohol, or even imitating the tourists with regards to lifestyle and the wearing of certain clothing.

Hejazeen (2007) differentiates between three categories regarding the social perception of women who work in tourism; women living in big cities are more involved in the tourism industry where society is usually more open-minded, while on the other hand women experience greater difficulty in getting social consent to this in the rural and Bedouin societies.

MOTA statistics show that the presence of women in the tourism sector is not very high. In fact, among 34,455 workers in tourism by 2007 only 3,440 of these were women, accounting for 9.98%, while statistics compiled at the end of the first quarter of 2008 showed that there were 3,651 women among 35,484 workers in tourism, representing 10.2%.

The most preferred work category for women was the travel agency sector in which there are about 928 women out of a total of 3,533 travel agency workers, accounting for around 26.2%. The high percentage of women in this sector is related to the administrative nature of travel agency work, thus there is a low risk margin regarding the negative behaviours mentioned before.

In the handicraft shops there are 134 women out of 451 workers, accounting for 22.9%, while the presence of women in the diving centres is about 25%. However, the presence of women is evidently low in the main tourist activities where hotels, for example, attract only 1,127 women out of a total of 13,460 people working in this sector, which corresponds to 9%. Nevertheless, the percentage of women working in hotels varies according to the place in which the hotel is located, and in this respect it is observed that there are more women in the hotels located in Amman, Aqaba, and Madaba, while there are fewer women working in hotels in cities such as Petra, Jerash, Karak, Ajloun, and other tourist destinations.

In the restaurant sector there are about 1,357 women among 14,062 employees, which corresponds to 9.77% of the total number of workers in restaurants.

In addition, women are not well represented in the rest of the tourism-related activities such as tourist transport companies, rental car agencies, being a tour guide, camel and horse drivers, and water sports[1]*.*

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[1] *Ministry of Tourism and Antiquities; Statistics and Information Dep.; 2008.*

3.5. The contribution of tourism to the Jordan GDP:

The Jordanian economy prospered significantly in the years between 2002 and 2008, despite the critical political crises from which all the Middle East area suffered, particularly during the invasion and occupation of Iraq. Moreover, the Jordanian economy faced a number of problems due to the increase in the price of oil as a consequence of the suspension of Jordan being able to buy Iraqi oil at special prices, causing a steep increase in the price of many basic goods such as foodstuffs, and construction materials, including cement, iron, and steel.

By 2007, the Jordanian GDP had grown by 6%, which was a little bit lower than 2006 when the GDP had reached 6.3%. This growth raised the per capita *GDP by 3.7% in 2007, whereas in 2006 this figure was 3.9%. (The Jordanian GDP grew from JD 6778.5 million in 2002 to JD 8164.40 million in 2004, and to over JD 11352 million by 2007).*

The increasing economic growth and the great investment in the Jordanian market created a huge number of vacancies for Jordanians, reducing the unemployment rate from 14% in 2006[1] *to 13.1% by 2007*[2]*.*

Exploring the contribution of the various economic sectors, the tourism industry contribution increased considerably from 2002 due to the increase in the number of arrivals to Jordan as well as the amount of investment in tourist activities.

In fact, tourism contributed 6.2% to the GDP in 2002, 11.6% in 2004, and more than 14.6% in 2006, while its contribution slowed down a little by 2007 when it was 14.4%[3]*, (see Table no.11).*

3.6. Investment in the Jordanian tourism sector:

The widespread privatisation policy adopted by the Jordanian government since the 1990's was in line with the conditions requested by the International Monetary Fund and the World Bank that Jordan give the private sector more influence in the economic process. Actually, Jordan privatised various strategic sectors such as Royal Jordanian Airlines, various public transport groups, the telecommunications sector, and some mineral factories.

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[1] *Jordan Central Bank, Annual report, 2006.*

[22] *Jordan Central Bank, Annual report, 2007.*

[3] *Ministry of Tourism and Antiquities; Statistics and Information Dep.; Tourist receipts and expenditures 2007.*

Since 1999, the government enacted various economic reforms in order to enhance the investment environment. The government paid particular attention to legislative reforms, and found that in order to attract investors to the country it is necessary to enact certain laws and regulations that give investors incentives and privileges in order to encourage them to enter the Jordanian market. Furthermore, a great deal of effort was made to improve the performance of the public sector to be in keeping with development requirements. These great steps led to some positive results with the various economic sectors, the Jordanian GDP growth average rate rose from only 3.4% in 1999 to more than 6.4% by 2006, and the public debit decreased from being 95.5% of GDP in 1999 to less than 51.4% by 2006.

Table no.11

Tourism Receipts & Expenditures from 2002 to 2007

YEAR	***Receipts***	***Payments***	***Balance (Net)***	***% Change Receipts***	***GDP at Market Prices***	***Receipts to GDP***
2002	*743.20*	*321.30*	*421.90*		*6778.50*	*6.2%*
2003	*752.60*	*320.40*	*432.20*	*1.3%*	*7203.60*	*10.4%*
2004	*943.00*	*371.40*	*571.60*	*25.3%*	*8164.40*	*11.6%*
2005	*1021.60*	*414.80*	*606.80*	*8.3%*	*9163.00*	*11.1%*
2006	*1460.80*	*594.40*	*866.40*	*43.0%*	*9997.50*	*14.6%*
2007	*1638.90*	*625.50*	*1013.40*	*12.2%*	*11352.00*	*14.4%*

Source: Central Bank of Jordan

As a matter of fact, the Investing Law was an important factor in the investment flow to Jordan, as it led to Jordan attracting 424 million dollars in 2002, 1,058 million dollars in 2005, and over 2,304 million dollars by 2006, representing an economic boom for the country[1].

In addition, joining international organisations, like the World Trade Organization (WTO) and signing certain economic agreements, such as the US-Jordan Free Trade Agreement, Qualifying Industrial Zones (QIZ), the Greater Arab Free Trade Agreement (GAFTA), the Aghadir Agreement, and the Euro-Jordan Partnership Agreement, helped Jordan to raise its profile as a good place for investment.

Actually, it is important to point out that the tremendous increase in oil prices did in fact have some positive impact on the Jordanian economy because of the high returns in the neighbouring Arab Gulf countries. In fact, many Arabian Gulf businessmen came to Jordan and invested in various economic sectors, among them the tourism sector[2].

The indicators of the Jordan Investment Board show that the tourism sector was one of the sectors that attracted the most investment, benefitting from the Investing Law. The growth rate of tourist investments that benefitted from the Investing Law recorded an increase by 67.5% in 2007 compared to 2006, counting in 2007 about JD 407 million divided between 14 projects while there was about JD 243 million divided between 20 projects in 2006. Moreover, banking loans and financial facilities related to the tourism sector increased by 31.1% in 2007 compared to the previous year[3].

3.7. Added value created by the tourism industry:

The concept of added value represents the difference between the final price of the product and the cost of the raw materials used in the production process such as wages and salaries, rent, interest, and so on[4].

In this sense, it is obvious that the added value of any product becomes less significant when the producers resort to import their primary materials from outside the country. For instance, the use

[1] *Jordan Investment Board, Investment environment report.*

[2] *World, Bank, Middle East and North Africa Region Economic Developments and prospects, 2007*

[3] *Jordan Central Bank, Annual report; 2007; p. 12.*

[4] *Maqableh, Khaled; and Feisal Al-Haj Dheeb; Tourism industry in Jordan; previous mentioned source, p. 96.*

of foreign manpower in some tourist activities in Jordan, especially in the restaurant sector reduces the added value of these activities. This situation is called financial leakage and it can sometimes happen through the tendency of tourism sector employees to spend their salaries on imported goods at the expense of nationally produced ones[1].

In fact, the added value created by the tourism industry has increased considerably in the last few years, being about JD 494.2 million in 2004, JD 827.2 million in 2006, and more than JD 928.1 million by 2007[2].

3.8. Foreign exchange earnings and the enhancement of the balance of payments:

As has been pointed out already, tourism is one of the fundamental resources for foreign exchange, in fact the national income generated from the tourism sector has risen from JD 943 million in 2004 to JD 1021.6 million in 2005 , JD 1460.8 million in 2006, and to over JD 1638.9 million by 2007.

These increasing tourist receipts were also associated with an increase in spending by Jordanians outside the country, whether this be for study purposes, health reasons, or for tourism. The total amount of foreign expenditure in 2004 was about JD 371.5 million compared to JD 414.8 million in 2005, JD 594.4 million in 2006, and to more than JD 625.5 million by 2007[3].

3.9. Jordanian strategies to develop the tourism sector:

Since Jordan was hoping to realise the political and economic reforms that serve to enhance various development projects in all economic sectors, it built the necessary strategies for each specific sector in cooperation with interested parties that are directly concerned.

Together with the American agency USAID, Jordan has prepared important reform plans such as the strategy created for the period 2004-2009, and the strategy for the period 2007-2011 which outline a number of targets to work towards as the enhancement of the democratic path in Jordan, support for public social services, creation of job opportunities for Jordanians, the reorganisation of water resources management, and the management of financial burdens and external debt[4].

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[1] *Ta'amneh, Mutee' Shebli; previous mentioned source, p. 85.*

[2] *Jordan Central Banck; annual report; 2007.*

[3] *Jordan Central Bank; An economic survey conducted in 2006/2007.*

[4] *USAID/ Jordan , Strategic Statement : Jordan 2007-2011 Amman 2007 p. 5.*

3.9.1. National tourism strategy 2004-2010:

This strategy was carried out by MOTA and the JTB with the support of USAID to spotlight the main steps that should be worked out in order to develop the tourism industry in Jordan.

To double tourist receipts by 2010 is the fundamental target of the national tourism strategy. It is hoped that these receipts will be increased from JD 570 million in 2003 to more than JD 1.3 billion (about US$ 1.84 billion) by 2010. Moreover, the plan is to create more than 91,719 jobs in the tourist industry by 2010, and also that the taxation yield to the government will increase by JD 455 million by 2010.

The research of the national tourism strategy found that the tourism industry in Jordan faces particular obstacles that need to be addressed, namely the negative image of Jordan as an insecure destination because of the political crises from which the Middle East suffers, a lack of financial resources available to enhance the tourism industry and to cover the costs of promotional efforts abroad, the necessity of building a partnership between the private and public sector to conduct a joint Master Plan, studying the real factors affecting the shortness of the tourist stay in Jordan compared to neighbouring countries, exploring the connectivity level and to what extent Jordan is an accessible destination, studying tourist market needs and categorising these so that they can be satisfied, and finally developing the Jordanian tourism product so that it matches the expectations of the tourists.

The strategy was based on four fundamental pillars to develop the tourism industry:

1. *Enhancing the image of Jordan by means of the implementation of programmes and plans that present Jordan as a destination with various attractions and possibilities leading to an increase in the number of arrivals to Jordan.*
2. *Developing the Jordanian product to be competitive through the diversification of its components to cover several categories.*
3. *The retraining of human resources working in the tourism sector by holding training courses in order to provide the tourism industry with the qualified manpower that it needs.*
4. *Harmonising laws, regulations and public policies with the targets of the strategy*[1].

[1] *JTB Jordan Tourism Board; Jordan National Tourism Strategy 2004-2010.*

In a report compiled about the basis of the National Tourism Strategy, it was pointed out that the Jordanian tourism product is composed of many current components that can be used immediately, even if they need to be developed, such as cultural components, heritage, religious tourism, adventure, natural tourism, curative tourism, cruises, conference tourism, and educational tourism.

Meanwhile other sorts of tourism such as summer tourism, family tourism, festival tourism, filming and photography tourism, and sports tourism are potential forms of tourism that Jordan can try to develop[1]*.*

3.9.2. Plans prepared by tourism activities players:

Some tourism sectors have prepared their own vision to develop their work and to enhance their degree of performance as an initiative to overcome the various difficulties and barriers that impede the progress of the tourism industry in Jordan.

3.9.2.1. The Jordan Tourism Board (JTB) plan:

The JTB highlighted the marketing process and the promotion of the Jordanian product as the main priority to work on, through the use of public relations, the media, advertisements, and other publicity, taking in consideration the importance of changing the typical image of Jordan as an insecure destination.

In addition, the JTB also aims to cooperate with the main national and international air carriers to encourage them to increase their flights to Jordan, enhancing the degree of accessibility. Furthermore, it calls upon all tour operators to use a charter policy to guarantee regular flights between Jordan and the other destinations around the world.

It also highlights the necessity of human resources as a cornerstone in the development process, thus the main qualifications and competencies that should be focussed upon were emphasised.

Regarding the field of tourism marketing, the JTB shed some light on the promotion projects that have to be carried out, emphasising the need to build a strong partnership between the various parties involved in the tourism industry such as MOTA, the JTB, Royal Jordanian Airlines (RJ), ASEZA, and other relevant partners.

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[1] *USAID/ AMIR Program; National Tourism strategy Initiative Product, Development Work Group Report, 2002, p.4.*

By 2007, the JTB had assigned about JD 7 million to marketing projects in a number of countries, particularly the USA, Canada, the UK, Italy, France, Germany, the Arabian Gulf countries, and Lebanon. In addition, the JTB tried to strengthen the relationships with tour operators by holding periodic meetings to discuss the ideal way to develop the tourist packages offered in the international markets in order to be more competitive.

Moreover, the JTB has spotlighted the Jordanian presence in the international trade fairs that specialise in the tourism industry as well as exploiting the new technology, particularly the internet to promote the Jordan product, thus it is important, from the point of view of the JTB, to launch an efficient internet website that is available in the main international languages[1].

3.9.2.2. The hotel and restaurant sector plan:

According to the hotel and restaurant sector, the image of the Jordanian product was also the first challenge to the tourism industry in the country. Thus, the introduction of information points in hotels, restaurants, airports, crossings and borders with neighbouring countries has been proposed so that brochures an booklets can be distributed that show the real image of Jordan.

Moreover, this sector considers that hosting international media and important journalists, and giving them some ideas about Jordan and its product is a good means to change the image of Jordan over time.

This plan also indicates the necessity of a high level of coordination between product stakeholders, especially tour operators and transport companies, to offer a competitive product at a reasonable price.

In relation to this, there is the substantial building of coalitions between these stakeholders from both the public and the private sector in order to unify their promotional as well as organisational efforts.

To be in harmony with the requests for competitiveness, the plan emphasises the importance of conducting periodic analyses and studies on tourist markets to make sure that the programmes offered are always up-to-date and suitable in terms of international criteria[2].

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[1] *JTB (Jordan Tourism Board); JTB 2006 Marketing plan, 2006, p. 1-5.*

[2] *National Tourism strategy, Hotel and Restaurants Suggested sectoral 2005 Action Plan.*

3.9.2.3. Tour operators and airlines plan:

This plan called on the government to give the tourism industry priority in its strategies and policies, as its contribution is fundamental to the national economy, and it also asked for the reorganisation of tourism marketing efforts headed by the JTB by giving the private sector more authority in the marketing policies conducted by the JTB.

They see that the negative image of Jordan is derived from the Western idea that the part of the Palestinian territories known as the West Bank has also been known as West Jordan. This means that tourists tend to confuse West Jordan (meaning the West Bank) and the actual country of Jordan.

The plan calls for increasing the number of flights to Jordan, improving Queen Alia International Airport (QAIA) services, and supporting the presence of traditional handicrafts in the tourism product.

Moreover, it points out that the enhancement of the transport sector requires the adoption of an open skies policy, and the encouraging of low-cost airlines to operate in the Jordanian market as well as inviting European airlines to increase the number of their flights to Jordan.

Regarding the dissemination of information, this plan calls for a global revision for all tourist brochures, booklets, and maps to keep them up-to-date and adequate with regards to the continuous changes in the tourist sites[1].

3.9.2.4. Tour guides plan:

In this plan, the tour guides highlight the necessity of local community inclusion in the tourism industry by giving more opportunities for both tourists and locals to meet and interact, thus reducing the negative aspects that can result from the lack of direct communication.

In addition, the guides consider that their contribution to the promotional efforts are not enough, thus they ask for an increase in their participation in the international tourist fairs.

According to the guides, the main weak points of the Jordanian tourism product are the absence of nightlife and activities to occupy the free time of the tourists in the tourist destinations, causing boredom that leads in most cases to tourists reducing their length of stay[1].

[1] *National Tourism strategy, Tour Operators and Airlines Group, Suggested Sectoral 2005 Action Plan.*

3.9.3. Tourism marketing strategy of ASEZA:

This strategy aims to realise three fundamental goals:

A. *Promoting Aqaba as a top quality tourist destination.*

B. *Highlighting Aqaba as a distinctive city in which to spend holidays, as a good choice for doing water sports, as a central port for cruising, and as a main gate for Jordan and whole of the Middle East area.*

C. *Lengthening the stay of tourists in the Gulf of Aqaba.*

ASEZA was able to build an outstanding identity for the city of Aqaba by linking holiday offers and recreational activities on the Red Sea with adventure trips to the desert and mountains of Wadi Rum, and then visiting the marvellous city of Petra, thus creating the package which has become known recently as the Golden Triangle Tour.

By this vision, ASEZA aims to raise the occupancy rates in the city and to increase hotel capacity to be able to receive over 2 million nights by 2010 as well as raising tourist expenditure in the tourist sites by 20% in 2010 compared with what we have at present.

This strategy has divided its target markets into:

a. *Countries which are currently connected to Aqaba by charter flights, or at least have serious projects in this field, these countries being Austria, UK, Hungary, Slovakia, Slovenia, The Czech Republic, Poland, Italy, Russia, and Spain.*

b. *Markets that export a huge number of tourists to Aqaba, this category including local tourists, and those coming from countries such as Hungary, Saudi Arabia, Iraq, France, UK, Germany, and USA.*

c. *Markets that are rapidly growing such as UK, France, and Germany*[2].

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[1] *National Tourism Strategy, Tour Guides Group; suggested sectoral 2005 Action Plan.*

[2] *ASEZA, Tourism Marketing Strategy for Aqaba 2005-2010 P 5-13.*

3.9.4. The strategy of retraining the human resources of the tourism industry:

This strategy involves an analysis of the employees in the tourism sector, highlighting the necessity of increasing training programmes, and establishing a specialised centre or institute that deals with tourism sector manpower, and providing MOTA employees with the necessary competencies and skills to improve the quality of their work. These competencies include communication skills and customer care.

Moreover, this plan calls for taking care of the quality of various categories of manager working in the tourist enterprises and firms due to the fact that their decisions and management style are very crucial in designing the general policies of their firms, and consequently of the tourism industry.

The urgent need to conduct more studies and carry out more research on the tourism sector in Jordan implies the necessity of creating new scientific institutes that are concerned with tourism management principles and concepts. In some way this will help to cover tourism sector needs in terms of the modern tourism management tools that have already been used by the countries in the region and have already been successful in attracting large numbers of tourists. In fact, creating and promoting such institutes will be very useful in carrying out specific tasks regarding the analysis and studies to explore the nature of human resources employed in the national tourism market.

According to the strategy the retraining of staff will play a vital role in increasing the ability of the Jordanian product to penetrate the international tourism market and to be significantly competitive in that market[1].

3.10. Tourism vision for 2020:

The WTO forecasts show that global tourist arrivals are going to reach over 1.6 billion by 2020, with an annual growth average rate of 4.1%[2]. Europe will continue to be among the top regions that attract tourists, although it is predicted that there will be a decrease in the numbers of arrivals that Europe will receive and that the growth rate to European destinations is expected to be 3.1%, lower than the world average.

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[1] *Dr. Nicholas Ruddy, Tourism Human Resource Development Strategy for Jordan , Final Report , Supported by USAID, P 4-21 .*

[2] *WTO (World Tourism Organization), Tourism 2020 vision p. 18.*

East Asia and the Pacific area will upgrade to being the second largest receiving region with a market share of 25% of total arrivals, showing an annual average growth rate of 6.5% against only 18% of the share recorded by the Americas (North and Latin America), with an annual average growth rate of 3.9%.

The prospects regarding Africa are also positive, as the volumes of arrivals will record an increase from 20.2 million in 1995 to over 77 million by 2020, giving an annual average growth rate of 5.5%. The African share of the market is predicted to be over 5% of world tourist markets by 2020.

For the Middle East, forecasts show that there will be an increasing interest in the tourism industry on the part of the government. Such interest springs from the tendency to diversify national income resources in the Arabian Gulf countries in order to maintain economic prosperity when the oil runs out, thus many strategy makers find in tourism an important economic power which can be relied upon.

The tourist numbers that the Middle East will receive will rise from 12.4 million in 1995 to more than 69 million by 2020, with an average annual growth rate of 7.1%. The Middle Eastern share of the tourist markets will also increase from 2.2% in 1995 to over 4.4% by 2020[1].

In addition, the WTO has defined the main elements that impact upon the tourism industry in MENA and influence its future. Of these elements, the tendency to be less dependent on oil resources, the growth of religious tourism, particularly in some destinations like Bethlehem in Palestine, and Mecca in Saudi Arabia, stability in the MENA area, the integration level among the MENA countries through cooperation and partnership projects, the conducting of joint promotional campaigns, and finally the building of tourist facilities of various categories.

In relation to this, Jordan has built its strategy, presenting itself as a distinctive destination that offers a selection of attractions and services, as a result of its unique tourism resources. This vision was prepared and promoted by pioneering businessmen to enhance growth in the various economic sectors, the tourism sector, of course, being among them.

The strategy aims to build a strong and sustainable partnership between the public and private sector to get a competitive advantage in the international markets, to give the Jordanian business sector the ability to penetrate the foreign markets, to realise a world class infrastructure, and

[1] *WTO, Tourism 2020 vision, volume 7, Global Forecast and profiles of Market segments p.18-24.*

improve the quality of Jordanian human resources by a global process of both retraining and continuous training[1]*.*

According to WTO expectations, Jordan is one of the tourist destinations that will show significant progress in the number of arrivals it receives, and it is predicted to be the fifth most popular destination in the MENA area after Egypt, which has traditionally been a pioneer destination, Saudi Arabia, which has always been significant for religious tourists, Dubai, and Bahrain[2]*.*

However, the tourist demands on the MENA area destinations may exceed these forecasts, but such results are subject to some political conditions that any progress in the peace process means more tourist flow towards the MENA area.

Nowadays, there are a huge number of projects that aim to increase the capacity of destinations to receive more tourists, and of these projects there is the intention to build about 600 new hotels with more than 650,000 rooms, with an investment amount that exceeds US$ 390 billion, creating about 1.5 million jobs in the MENA area[3]*.*

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[1] *Jordan 2020 vision, An Initiative of Leading Jordanian Business Associations, Amman, 1999.*

[2] *WTO, Tourism 2020 vision, Volume 5, Middle East.*

[3] *The Talent Jungle Network, Global Futures and Foresight, The Future of Travel and Tourism in the Middle East – A vision to 2020, Hotel Outlook 2020, 2007 p.2.*

Chapter Four

Public policies and laws

that regulate the tourism industry in Jordan

The constitution of Jordan stipulates that the country is a monarchy, composed of three separate authorities: the executive, the legislature, and the judiciary. The executive authority is the King who appoints the Prime Minister and other ministers to carry out the various governmental functions and duties[1].

The legislative authority represents parliament which is divided into the Senate and the Chamber of Deputies, the Senators usually being selected by the King, while Deputies are elected by the people[2].

The judiciary power is undertaken by the various courts. In the constitution the independence of the three separate authorities is emphasised, as is the independence of the judicial authorities[3].

Despite the fact that the constitution urges the independence of the three authorities, putting into practice such a rule is completely different. The executive authority prevails against the legislative authority, and tends to be the main player in the political life of Jordan. While the legislative authority on the other hand does not carry out its tasks as the constitution authorises, especially regarding some issues like control and monitoring. It is rare that the Jordanian parliament resorts to a vote of no confidence in the government, because it is usually afraid of the dissolution of parliament by the King upon the request of government and the calling of an early election[4].

As for the tourism industry in Jordan, matters relating to tourism were historically dealt with by the Directorate of Antiquities during the Jordanian Emirate period, which started prior to independence, lasting from 1921 to 1946. By 1953, Jordan had established for the first time a public entity to take care of the tourism sector and it reported directly to the Prime Minister until

[1] Jordanian constitution; articles no. 1-28; issued on 8/01/1952.

[2] Jordanian constitution; articles no. 62-96; issued on 8/01/1952.

[3] Jordanian constitution; article no. 97; issued on 8/01/1952.

[4] Al-Dabbas; Nazeeh; Tourism and hotel industry regulations and laws; published by Dar Al-Hamed; Amman; 1999; p. 348.

1960 when the government decided to upgrade it, launching the Tourism Authority to act according to Law No. 17/1960.

In order to improve the tourism industry, Law No. 10/1968 was issued which stipulated that the Tourism Authority is an independent public body both administratively and financially. This authority was later transformed into the High Council of Tourism gathering under its aegis the main institutions and entities related to the tourism sector[1].

After one decade, precisely on 9th January 1988, Jordan announced the inception of the first Ministry for Tourism to which the Directorate of Antiquities also reported[2].

4.1. The division of responsibility for tourist affairs between the different public authorities:

The tourism industry is governed by several public bodies whose remit varies from one authority to another, with some of them working at a national level, while others act in specific geographic areas.

4.1.1. Ministry of Tourism and Antiquities (MOTA):

The Ministry of Tourism was established in 1988 in response to the government awareness of the importance of the tourism industry in relation to the national economy. Indeed, in Jordan it was discovered that the lack of a public reference for tourist affairs which takes care not only of tourism activities, but also sets rules that regulate the performance in this sector, leads to the loss of the various economic opportunities that tourism can offer, especially if the country concerned is actually rich in terms of tourism resources.

Article No. 3 of Tourism Law No. 20/1988 stipulated that MOTA has the following responsibilities:

1. *The protection of tourist sites.*
2. *The licensing of various tourist activities and professions, and the classification of these, (such as travel agencies, tourist transport companies, hotels, campsites, tour guides, handicrafts and traditional works, tourist restaurants, and amusement and recreational centres).*
3. *Facilitating tourism-related bureaucratic procedures.*

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[1] *Tourism Law no. 10/1968; Official Gazette, Vol. 2076, issued on 15/02/1968.*

[2] *Maqableh, Khaled and Feisal Al-Haj Dheeb; Tourism industry in Jordan; previous mentioned source; p.68-69.*

4. *Conducting promotional campaigns.*
5. *Encouraging domestic tourism.*
6. *Supporting businessmen to invest in the tourism industry.*
7. *Providing tourism activities with qualified staff who are equipped with the essential skills.*
8. *Preparing studies and doing research to explore the needs of the tourism industry and to improve performance in relation to tourism activities.*

In Articles Nos. 5 and 6 the law called for the establishment of a Higher Council of Tourism to be composed of the Minister of MOTA (to be Head of the Council), the Minister of the Interior, the Minister of Industry and Commerce, the Minister of Health, Minister of Planning, Minister of Culture, the Chairman of Royal Jordanian Airlines, the Chairman of the Aqaba Special Economic Zone Authority (ASEZA), the Social Security Corporation Chairman, the Secretary General of MOTA, and three representatives from the private sector selected by the Minister of MOTA to be members of the Council for two years.

The Higher Council of Tourism sets general policies that organises the tourism sector, presents drafts and proposals of tourism laws, concludes tourism agreements with other countries and international institutions, works on establishing tourism training centres, sets criteria for the gaining of various licences within the tourism professions, and adopts various promotional campaigns[1].

Many regulations were issued under the umbrella of Tourism Law No.20/1988 and Antiquities Law No 21/1998, as the Regulation of Tourist Restaurants[2] *No. 6/1997, Tour Guide Regulation*[3] *No.34/1998, Travel Agency Regulation*[4] *No.11/2005, Hotel and Tourist Facilities Regulation*[5] *No. 7/1997, Handicrafts and Traditional Work Factories Regulation*[6] *No. 36/2002, Tourist Transport*

[1] *Tourism Law no. 20/1988; Official Gazette, Vol. 3540, issued on 17/03/1988.*

[2] *Regulation of tourist restaurants no. 6/1997; Official gazette; Vol. 4185 issued on 16/02/1997.*

[3] *Tour guides regulation no.34/1998; Official gazette; Vol. 4290 issued on 01/07/1998.*

[4] *Travel agencies regulation no.11/2005; Official gazette; Vol.4693 issued on 16/02/2005.*

[5] *Hotels and tourist facilities regulation no. 7/1997; Official gazette; Vol. 4185 issued on 16/02/1997.*

[6] *Handicrafts and traditional works factories regulation no. 36/2002; Official gazette; Vol.4542 issued on 01/05/2002.*

Regulation[1] No. 7/1995, Baptism Site Board Regulation[2] No.48/2001, Jordan Tourism Board Regulation[3] No. 62/1997, and Petra Archaeological Park Regulation[4] No. 78/2007.

4.1.2. ASEZA (Aqaba Special Economic Zone Authority):

Jordan established ASEZA, issuing Law No. 32/2000 that identifies its parameters as well as its duties. According to the provisions of this law ASEZA has become the legal successor of the Aqaba Region Authority as well as Aqaba Municipality. The initiative of ASEZA was launched to motivate the private sector in order to make it more involved and active in the economic environment that ASEZA offers, particularly with the great incentives and exemptions applied in the economic zone.

In Article No. 3 of ASEZA law, it is pointed out that the purpose of this initiative is to improve the competitive image of Jordan as an outstanding economic environment in which businesses can invest, and such a result comes out of the involvement of the private sector in the global planning process as well as breaking all barriers that may impede free and fair competition. Moreover, the law considers environmental protection to be one of the main responsibilities that ASEZA should take on[5] .

The law allows Aqaba to offer a lot of economic privileges to the investors such as reduced income tax that does not exceed 5%, exemption from Social Tax, exemption from Land and Building Tax, exemption from tax on profits, permission to import goods to the economic zone without any duties, giving foreigners the right to own mobile or immobile properties without any limit, breaking any barriers that are an obstacle to the movement of individuals, permission to sell or lease lands for investment purposes, and finally the protection of their intellectual property rights.

ASEZA also takes care of the Wadi Rum Reserve in accordance with Paragraph C of Article No. 11 of the ASEZA law that stipulated that ASEZA is the body responsible for environmental protection in Wadi Rum.

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[1] Tourist transport regulation no. 7/1995; Official gazette; Vol. 4033 issued on 01/04/1995.

[2] Baptism site board regulation no.48/2001; Official gazette; Vol. 4499 issued on 30/07/2001.

[3] Jordan tourism board regulation no. 62/1997.

[4] Petra archaeological park regulation no. 78/2007; Official gazette; Vol. 4840 issued on 06/08/2007.

[5] ASEZA law no. 32/2000; Official gazette; Vol. 4453, issued on 31/08/2000.

The bold initiative of the launch of ASEZA has represented a turning point for the tourism industry in the south of Jordan, especially in Aqaba and Wadi Rum. The major part of the private sector-driven plans were extremely oriented towards the tourism industry as an engine for development, generating an abundance of huge projects like hotels, recreational services and facilities, and suchlike.

To get such a result, ASEZA put in place a number of regulations with the aim of organising economic activities, and at the same time optimising the performance of public authorities. These regulations include the Labour and Residency Regulation No.90/2000 which gives investors the right to employ foreigners as up to 70% of their workforce, the organising of accounts and financial statements for the registered enterprises in Aqaba zone is covered by Regulation No. 23/2001, the Registration and Licensing Regulation No. 13/2001, Sales Tax Regulation No. 54/2005, Income Tax Regulation No. 53/2005, Customs Regulation No. 9/2001, Environmental Protection Regulation No. 21/2001 by which all economic activities within the economic zone are subject to certain criteria in order to guarantee the use of environmental resources in a proper manner.

One of the regulations which is most related to the field of tourism is the Regulation of Development and Management of Aqaba Economic Zone No. 6/2001. According to this regulation, a special enterprise was established to develop Aqaba city in such manner that it would be suitable for the requirements of investors.

So the enterprise takes on the responsibility of enhancing the infrastructure of the zone as well as taking care of marketing projects which will hopefully attract investment[1].

Moreover, the Regulation of Marine Park no. 32/2000 was approved with the aim of preserving the environment and protecting natural resources, improving the beauty of the park's shores, managing and monitoring various economic, commercial, tourist, and scientific activities, and conducting projects that lead to the improvement of the coral reefs and other natural resources that have been damaged by human activity[2].

Regarding Wadi Rum, Regulation of Wadi Rum No. 24/2001 was issued by which wide ranging responsibilities are undertaken by ASEZA. Thus, the authority of Aqaba has become the public body that takes care of the development of the Wadi Rum area and the improvement of the quality of

[1] *Article 4 of development and management of Aqaba zone regulation no 6/2001.*

[2] *Article no. 4, 7, and 12 of marine park regulation no.32/2000.*

public services in order to enhance its ability to attract tourist flow. By this vision, it is possible to create more job vacancies for locals in handicraft shops and other tourist services, which will increase the awareness of local people of their heritage and cultural values, in such manner that stimulates them to keep these values and to protect natural resources[1]*.*

The environmental strategy put together for Wadi Rum implies the handing out of a roadmap that vehicles should follow, identifying the appropriate locations to establish campsites, preparing areas for people who enjoy hiking, as well as training local habitants about this type of recreational activity, and conducting training programmes for them on rescue operations in cases of emergency[2]*.*

Finally, the Regulation of Investment Climate No. 11/2001 was also approved, which is issued according to Article No.3 of Aqaba Zone Law. The regulation aims to enhance the economic capabilities of the city by attracting investment in a number of areas such as hotels, amusement facilities, diving and water sports centres, travel agencies, tourist transport, taxi agencies, commercial and industrial activities.

This regulation identifies the main mechanisms to be followed to license various investment projects in the economic zone, underlining the criteria that investors should respect in order to get permission[3]*.*

4.1.3. Jordan Tourism Board (JTB):

The establishment of the JTB in 1998 was a public initiative to enhance tourism marketing in response to the general feeling that not enough effort was being made to promote the Jordanian product abroad.

For this purpose, Regulation of JTB No. 62/1997 was issued in which it was stipulated that the JTB undertakes a number of tasks (Article No. 4 of JTB Regulation), such as spreading awareness of the country, preparing promotional materials such as brochures, films, booklets, and so on, conducting research and studies in this field to explore the product components and tourist market needs, creating infrastructure projects that enable tourist sites to attract visitors, retraining staff working

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[1] *Paragraphs A, E, F, and G; article no. 3 of Wadi Rum regulation no.24/2001.*

[2] *Paragraph A ; article no. 6 of Wadi Rum Regulation no. 24/2001.*

[3] *Regulation of investment climate no. 11/2001, the official gazette, Vol. 4474, issued on 31/01/2001.*

in the tourism industry, establishing a national information centre for tourism sector affairs, and taking part in all cultural events, festivals and other activities that can contribute to tourism development[1].

Recently, this law was replaced by the new JTB Law No. 79/2007 which stipulated in Article No. 5 that the JTB should be composed of several partners such as MOTA, ASEZA, Royal Jordanian, the societies of the various tourism professions, hotels, travel agencies, airlines, tourist transport companies, and other relevant partners whether private or public[2].

Since its inception date, the JTB worked seriously on the presence of the Jordanian product in the important tourist markets. Thus, it has opened several affiliates and branches in the foreign markets in order to understand the needs and requirements of the customer in such a manner that will help them to develop the product and its components. In this context, the JTB always has a presence at international tourist conferences and fairs.

4.1.4. Petra Region Authority (PRA):

The increasing number of tourists coming to Petra after the signing of the Peace Treaty with the Israelis made the Jordanian government think seriously about improving Petra by enhancing the services and tourist facilities as well as by developing the infrastructure and public utilities. Therefore, the government started to adopt the successful model that had been used in Aqaba at that time, establishing the Petra Region Authority in 1995 as a public body that concerns itself with matters to do with the city and its improvement projects. In the beginning, the PRA was associated with MOTA, and by 2001 it was launched as an autonomous public body and associated with the Prime Minister.

PRA Law No. 36/2001 was issued as a decree that stipulates, in Paragraph A, Article No. 4, that the Petra Region Authority is an autonomous public body which is financially and administratively independent[3].

By 2005 the new law for the PRA No. 15/2005 was issued. Article 5 of the law stipulated that the PRA aim to enhance economic and social development in the area by adopting suitable plans and

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[1] *JTB regulation no. 62/1997, Official Gazette, Vol. 3552.*

[2] *JTB regulation no. 79/2007; Official Gazette; Vol. 4840, issued on 06/08/2007.*

[3] *PRA law no. 36/2001; Official Gazette; Vol. 4499, issued on 30/07/2001.*

strategies, protecting the environment and natural resources as well as the water resources, optimising the partnership with the private sector, developing the tourism sector, conserving and protecting archaeological sites, classifying various sites according to their potential for tourist purposes, and supporting civil society NGO's.

The PRA was given wide authority regarding the urban development Master Plan, infrastructure projects, and many other responsibilities assumed by the PRA according to the provisions of the law.

Being aware of the importance of local community inclusion in the development and planning process, the law stipulated that six places on the board of the PRA be filled by representatives of the local community, these six members being appointed by the Prime Minister upon the recommendation of the PRA chairman. However, apart from stipulating that at least three of these members should be graduates, holding a BA or a BSc, the law has not laid down any other specific criteria for the selection of these members, thus the selection process may not actually be very practical in terms of guaranteeing the expected results, as in many cases decision makers tend to follow their own personal criteria[1]*.*

Notwithstanding the high expectations and hopes that people had of the PRA at the start of its activities in the area in 1995, particularly due to the fact that the PRA prepared and carried out a lot of infrastructure projects in the first few years, the authority has lately failed to continue this path of development and its presence in the pioneering strategic plans has somewhat diminished.

Indeed, Petra has a number of weak points in terms of its lack of global organisational vision, the excessive number of public bodies by which various area issues are handled (PRA, MOTA, Petra Archaeological Park, and the Province of Petra), the need to reorganise commercial activities, and the absence of promotional plans as well as the weakness of programmes which aim to prolong the length of tourist stay in the city, particularly in terms of evening recreational activities[2]*.*

[1] *Article no. 7; PRA law no. 15/2005, Official gazette; Vol. 4709, issued on 01/06/2005.*

[2] *Tweissi, Basem; Petra: Opportunities and challenges; an article written in Alghad daily, 17/06/2008.*

4.1.5. Petra Archaeological Park (PAP):

PAP extends throughout the whole of the archaeological part of Petra, covering about 264,000 dunum[1], and it encompasses the main tourist treasures in Petra.

The government issued PAP Regulation No. 78/2007 in accordance with Antiquities Law No. 21/1988, and has established the Archaeological Park Authority, specifying that this body is answerable to the Minister of Tourism for administrative matters and to the Director of Antiquities for technical matters, (Article No. 7 of the regulation).

PAP undertakes many strategies with regard to the archaeological sites as well as to services and facilities. Moreover, it is concerned with adopting adequate plans and strategies that will develop the park and its components as well as conducting studies and research into possible threats and challenges that face natural and archaeological sites because of some human behaviours and actions that cause problems[2].

4.1.6. Jordan Valley Authority (JVA):

The JVA was established in 1973, being originally known as the Jordan Valley Board, and the law of authority was issued in 1977. Yet, the government determined the boundaries of the JVA by issuing the Law of Jordan Valley Development No. 19/1988. According to this law, the JVA encompasses the broad area that extends from the northern Jordanian border to the village of Qatar in the south of Jordan, which belongs to Wadi Araba, in other words, this is all the western land along the Jordan river, Aghwar area, and Wadi Araba, including the Dead Sea, (Paragraph B of Article No. 2 of JVA Law).

Paragraph (D) of Article No. 3 stipulated that JVA's tasks are: development of the tourism environment in the Jordan valley, pinpointing the sites that are suitable for tourist activities, and enhancing the area by planning the necessary services and facilities, especially recreational ones.

The JVA is associated with the Ministry of Water and Irrigation and it is directed by an administrative board headed by the Minister of Water and Irrigation due to the fact that the Jordan

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[1] One dunum corresponds to 1000 square meter and it is an old Turkish meter which is usually used to measure lands.

[2] PAP regulation no. 78/2007; Official gazette; Vol. 4840; issued on 06/08/2007.

Valley is a vital and crucial territory for water resources in Jordan, particularly the Jordan River, the Dead Sea, and dams[1].

4.1.7. Baptism Site Board (BSB):

The Baptism Site has a significant value as it marks the Baptism of Jesus Christ by John, thus it is one of holiest Christian sites in the world, (Matthew 3:13). Seeing in the site an important resource for attracting religious Christian tourists, Jordan has became, in recent years, interested in the development of the capability of the site, especially with the end of the Second Millennium.

The visit of Pope John Paul II in 2000 represented a crucial and historical event for religious tourism in that the Baptism Site has been recognized as the only real site where Jesus was baptised. This declaration made religious tourism to Jordan increase considerably[2].

The increasing number of tourists coming to the Baptism Site prompted the government to launch the Baptism Site Board, and it has issued Regulation No. 48/2001 that gives the board the responsibility of taking on specific tasks in relation to the Bethany Site, such as developing the site and providing it with the necessary services in such a manner that it retains its particular cultural, religious, and historical characteristics, (Article No. 3).

The board undertakes control of archaeological excavations in Bethany and its vicinity as well as working on the protection of the site from the extension of various urbanisation projects which could threaten the nature of the site and its natural and cultural components. The board also makes the necessary plans and strategies that lead to the strengthening of the tourist image of Bethany.

The Minister of Tourism is at the head of the Administrative Board and this includes some officials from the Jordan Valley Authority, the Directorate of Antiquities, and other tourism sector experts. The director of the Baptism Site Board reports to the Minister of Tourism according to the provisions of the regulation (Article No. 9)[3].

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[1] *Regulation of Jordan Valley developing no. 19/1988, Official gazette; Vol. 3540, issued on 17/03/1988.*

[2] *Abu Ayash, Abd Elah; Humeid Al-Tai; and Jamal Al-Harami; An approach to tourism in Jordan: between theory and practise, Dar Al-Warraq publications; 1st edition; Amman; 2007; p. 340-341.*

[3] *Baptism Site Board regulation no. 48/2001; Official gazette; Vol. 4499; issued on 30/07/2001.*

4.2. Relationship between the various tourist bodies:

As it has been pointed out before, there are many public bodies with responsibilities in relation to tourism in Jordan. The numerousness of these authorities urges many questions regarding the relationship and coordination level between them in the process of making and promoting Jordan as a set of tourism components.

Notwithstanding that MOTA is the most important public authority that represents tourism in Jordan, many of its responsibilities are shared with other public tourism bodies present in the various areas of the country. For instance, a major part of the tourist responsibilities in Aqaba are handled by ASEZA which adopts its own strategy to promote itself together with Wadi Rum and Petra, (known as the Golden Triangle product), with a view to diversifying its product in the international tourist markets. The multiplicity of public players and the absence of coordination result in an evident state of fragmentation in relation to the organisational aspects, and this has a negative effect on the product image and its quality[1].

In Petra, the situation is not so different where establishment of the Petra Region Authority led to a lot of contradictory points of view. Some wanted Petra to remain under the direct control of the Ministry of Tourism, while yet others were of the opinion that it should be more autonomous. Indeed, the government preferred the second point of view and decided to establish the Petra Region Authority, associating it with the Council of Ministers. Nevertheless, MOTA has maintained its position by keeping the archaeological part of Petra under its control by establishing the Petra Archaeological Park that encompasses the main attractive treasures of the city.

In the western part of Jordan, the Jordan Valley Authority is an important public body that takes care of water resources, agriculture, and tourism as well, especially in the Dead Sea. Notwithstanding this, the Tourism Ministry is strongly present under the umbrella of the Baptism Site Board established in the Bethany site near to the Dead Sea.

At the other Jordanian tourist sites, such as Jerash, Amman, Umm Qais, Desert Castles, Ajloun, Karak, Shoubak, and Madaba, MOTA has relatively more power than any other authority.

In fact, the distribution of responsibilities is subject not only to geographical considerations, but also according to the nature of tasks that need to be carried out. An obvious example of the lack of

[1] Alrawadieh, Ziad; The Golden Triangular…; previous mentioned source, P. 91.

coordination is the weakness of the promotional efforts, which is most likely due to the fragmentation. The relationship is still fragile between the JTB, which is the first responsible body of tourism promotion, and the Ministry of Tourism, and this also seems to be the case with the other authorities such as ASEZA, PRA, JVA, and the private sector partners. The fact that these relationships are so fragile has very detrimental consequences for the development of tourism to Jordan.

The relationship between other firms and enterprises that offer tourist services such as accommodation, restaurants, and travel agencies, is more complicated due to the conflicting interests that determine their attitudes. For example, hotels had skyrocketed their prices in March 2008 without consulting other relevant players, such as travel agencies and tour operators who found themselves in difficulties because many of them had already sold their packages to the foreign agencies according to the past prices. Indeed, the majority of agencies threatened to cancel all packages and reservations made, even those that had been sold, if the hotels did not decide to change their new prices. Thus, it is urgent and vital to build a strong partnership between these stakeholders in order to avoid similar difficulties resulting from lack of coordination and communication[1]*.*

4.3. Incentives and privileges offered to attract investment to the tourism sector:

Jordan has enacted several pieces of legislation to open the door wide to businessmen to get in and invest in the various Jordanian economic sectors, among them, of course, tourism activities.

Tourism Investment Law No. 16/1995 is the most important one in this field, where its impact on the attraction of investments can be noticed. The law gives investors huge tax exemptions and economic privileges to induce them to invest in the industrial sector, agriculture, hotels, hospitals, maritime transport, and rail transport, as these sectors can contribute considerably to the augmentation of exports, the employment of Jordan manpower, and the enhancing of economic development, (Article No. 3).

The law has divided Jordan into three categories, namely Areas A, B, and C, according to geographic considerations and to the development level. Thus, more incentives and privileges are

[1] *Reham Fakhouri; Travel agencies threaten to cancel their packages if hotels don't change their new prices. An article written in Alrai Newspaper; 10/02/2008.*

given to investors who invest in Area C, which is the less developed category, than those who invest in the areas that are classified as being more developed, such as Area A, (Article No. 7).

According to this classification, hotels and other tourist resorts built in some geographic areas like the Province of Amman, The University of Jordan area, the Province of Wadi El-Seir, the Province of Petra, and the Dead Sea are subject to the incentives offered for Category A, while investments made in other Jordanian cities benefit from greater incentives as these territories are classified under Categories B and C, which are the less developed areas[1].

Moreover, the law permits investors to transfer their money freely as well as benefits without limits or obstacles, (Article No. 30).

In accordance with this law, the government has established the Jordan Investment Board (JIB) to organize, monitor, and control investments in Jordan. Furthermore, it is responsible for facilitating all bureaucratic procedures that investors may face during the establishment phase. For this purpose, the JIB launched the special and pioneering idea of the one stop shop, which is an office for all governmental procedures, which gathers together several governmental agencies to deal with the registration and licensing of projects, (Paragraph C of Article No. 14)[2].

In Aqaba, ASEZA succeeded in marking the zone as an ideal choice where any investor can go and invest his money and benefit from a very wide range of exemptions and incentives. The city has received particularly huge investments in the tourism sector, exceeding even the expectations and prospects of the government when it launched ASEZA in the first place.

As a matter of fact, the ASEZA Law No. 32/2000 and other regulations issued according to this law, particularly Investment Environment in Aqaba Zone Regulation No. 11/2001, are considered to be a precedent in Jordan in terms of the attraction of investment.

These laws have made a significant contribution to the attracting of investors to the Jordanian tourist market. The number of hotels established in Jordan rose from 129 hotels in 1994 to over 314 hotels in 2003, and the number of rooms from 7250 rooms in 1994 to more than 17,800 rooms by 2003.

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[1] *Regulation of investment sectors and areas no. 2/1996; Official gazette; Vol. 4052.*

[2] *Investment law no. 16/1995; Official gazette; Vol. 4075; issued on 16/10/1995.*

The amount of investment in the hotel industry increased from JD 59 million in 1994 to more than JD 1244 million by 2003[1]*. Investment in tourism continued to grow in the following years.*

4.4. Legislation concerning the conservation of cultural heritage and the protection of natural and environmental resources:

Recently, heritage conservation and environmental protection have become one of most discussed themes in Jordan because of the dangers that threaten many monuments and cultural sites.

In many Jordanian cities especially in Amman and Salt there had been a lot of problematic behaviours that have ruined or damaged old cultural remains. An obvious example of this is the historical Hamdan Cafe, located in the centre of Amman, which was demolished in order to make way for a new building, despite the fact that various protests had been called to stop the demolition process. This cafe had witnessed many crucial events in recent Jordanian history, in particular the holding of the first national conference in the 1920's which was attended by many distinguished Jordanian statesmen[2]*.*

A similar thing happened in Salt which had also hosted many notable Jordanian dignitaries in the first decades of the modern Jordanian state, especially as Salt was the centre of science and culture in Jordan, having the most important school in the country.

Indeed, many Jordanian activists expressed their discontent at the continuous demolition of old buildings in Salt. Therefore, the Municipality of Salt started to react against these threats by launching pioneering projects to protect over 657 old heritage buildings in cooperation with other public partners and international organizations. The protection plan included important buildings like Al-Saket Building, Al-Sukkar Building, Abu Al-Sarahad Building, the Great Mosque of Salt, and Al-Ain square. Furthermore, with the support of Japanese agencies, the municipality restored the heritage building of Abu Jaber and transformed it into Salt Historical Museum, as well as restoring Mesmar building to house the Directorate of Tourism, and renovating Al-Me'asher House with the support of its owner Mr. Rajai Al-Me'asher[3]*.*

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[1] *Abu Aiyash, Abd Elah, Approach to tourism industry in Jordan; previous mentioned source; P. 215-217.*

[2] *Hattar, Saed; Hamdan Cafe was pulled down; Report made for BBC channel; 28/02/2005.*

[3] *Lubna Al-Rawashdeh; Old houses of Salt and restoration process; a report published in Alghad Newspaper; 19/05/2008.*

Petra, on the other hand, has experienced pioneering initiatives that aim to conserve cultural heritage through the process of restoration and rehabilitation of old villages such as Attayyiba and Al-Nawafleh village, which have been inhabited by local villagers for the past two centuries.

The restoration has been made in such manner that keeps the originality of those sites and at the same time attracts a tourist flow of people who are interested in experiencing the traditional lifestyle of Jordanian villagers. The great success of these projects shed some light on the importance of heritage buildings in the tourism industry, thus Petra Region Authority copied the idea by restoring Elgi Village and transforming it to operate as a handicraft and souvenir market without any detriment to the original character of the site[1]*.*

Another similar project was carried out in the natural reserve of Dhana in which old houses were restored and transformed into a tourist resort. This idea attracted a lot of tourists to Dhana, and their number increased from only 2,304 tourists in 1994 to more than 60,000 by 2001[2]*.*

In addition to heritage and cultural sites, there are natural and archaeological sites that risk extinction because of destructive behaviour whether from tourists or locals.

Petra, which is the most important component of the Jordanian tourism product, faces the risk of erosion resulting from salt-weathering and the increasing rate of pollution. Thus, a technical team of experts from the Directorate of Antiquities and the German Technical Cooperation Society (GTZ) was composed in order to explore the best methods and the most suitable instruments that would help to protect Petra, especially the rock cut facades[3]*.*

Moreover, Petra suffers a number of other threats, particularly those from various activities taking place in the archaeological city that are not properly organised. Examples of these activities are: the use of riding animals, such as donkeys, horses, and camels, to transport tourists between the various places, causing significant damage; tourists walking up the ancient stairways, particularly those that lead to Al-Deir Temple and the Place of Sacrifice; some locals cutting coloured rock to

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[1] *Alrawadieh, Ziad; Golden Triangular….; previous mentioned source; p. 94-95.*

[2] *Arab League; Guide to the sustainable tourism in the Arab World; sustainable tourism concept and its implementation in cooperation with United Nation programme for environment; 2005; p. 18.*

[3] *Wedekind, w. and J. Ruedrich, Salt-weathering, conservation techniques and strategies to protect the rock cut facades in Petra / Jordan , Heritage, weathering and Conservation by Rafeal Fort , Taylor and Francis Group , London , 2005 PP 261-268 .*

make sand bottles to be sold as souvenirs to tourists, threatening many rock facades in the city due to their carelessness[1].

Wadi Rum also lacks the necessary procedures that organise tourist activities there, and so there are problems such as the excessive use of cars which threaten the ecosystem there by polluting the environment and damaging the wildlife in the desert which encompasses several kinds of animals.

The government has enacted a number of different laws to reduce the amount of harm done to heritage and cultural sites, as well as natural and archaeological sites. It issued the Law of Protection of Urban and Cultural Heritage No. 5/2005 which identifies the heritage buildings and the buildings that have cultural value related to specific historical, cultural, or religious events and people, on condition that the history of the building does not go back beyond the year 1750, as in this case, buildings are subject to the Law of Antiquities.

To put the law into action, the government has established a national committee for urban heritage whose tasks are: setting the criteria for the protection of heritage; preparing a list of all heritage sites and buildings to put them in the National Heritage Registry; conducting projects to restore and renovate heritage sites; reorganising various commercial activities inside these sites; increasing tourist flow; preparing educational material to make people more conscious of the value of heritage sites and buildings, (Article No. 5)[2].

The Development of Wadi Rum Regulation No. 24/2001 has also stressed the protection of heritage and environmental aspects, highlighting the importance of taking care of all components of which the ecosystem is composed in a manner that can guarantee the sustainability of these resources as well as protecting endangered and rare wildlife, such as mountain goats, the Arabian Oryx, and other species which are on the verge of extinction. Moreover, the regulation has highlighted efforts made to reduce the pollution caused by the arrival of cars to the desert area of Wadi Rum, considering that awareness campaigns are one of most effective solutions to deal with such matters, (Article No. 3).

In addition, the regulation has prohibited various activities that may threaten the natural environment of Wadi Rum, such as urban expansion out of the current boundaries of Wadi Rum

[1] *Tweissi, Basem; Petra: economic opportunities and development; an article written in Alghad Newspaper; 18/06/2008.*

[2] *Law of urban and cultural heritage protection no. 5/2005, Official gazette; Vol. 4702, issued on 31/03/2005.*

village, entering or exiting places by routes that are different from those specified for this purpose, mining or crushing plants, catching or hurting wild animals or fowl, destroying any important geological remains, drawing or writing on any walls or natural parts of the area, damaging plants, making fires, throwing waste and rubbish in the area, driving cars on routes other than the specified roads, putting animals to pasture in areas where this is not permitted, or outside the permitted season, and finally conducting any commercial, tourist, industrial, or agricultural activities without first getting permission from the relevant authorities, (Article No. 9)[1].

[1] *The Development of Wadi Rum regulation, previous mentioned source.*

Chapter Five

Tourist demand analysis

The number of tourist arrivals to Jordan has grown considerably in the past five years, (2003-2008), having been through some difficult moments in which the number of arrivals declined significantly, especially in the period between 1997-2003 when various crises and wars flared up whether to do with the Middle East specifically, or world matters in general[1].

The growth in tourism recorded in the last five years has been very noticeable in all of the Middle Eastern countries. Actually, it has been found that eight destinations from the MENA area are among the fastest growing thirty destinations in the world[2]. The average growth rate between 2000-2005 reached 10% as opposed to 12% in the period between 1995-2000[3]. Notwithstanding this growth, MENA's share is still very small compared to other destinations in Europe, America, South Asia and the Pacific.

5.1. Total tourist arrivals to Jordan:

As mentioned in previous chapters, the tourism industry prospered after the launch of the peace process in the Middle East and the Peace Treaty between Jordan and the Israelis, demonstrating the strong relationship between the growth of the tourism industry on the one hand, and security and political stability on the other.

Although there was a small number of tourist arrivals to Jordan in 1989 which was only 643,945 tourists, the number of arrivals was even lower in 1990, decreasing to 577,446 tourists, because of the outbreak of the Gulf War, and by 1991 only 439,481 tourists were recorded. Then, Jordan started to recuperate, attracting about 699,262 tourists in 1992.

After the signing of the Oslo Treaty between Palestine and the Israelis, and the Wadi Araba Treaty with Jordan, total tourist arrivals showed a considerable increase that reached 774,871 in 1993, and about 857,610 tourists by 1994.

Between 1995 and 1996, tourist arrivals jumped to 1,073,549, and 1,102,752 respectively, and the growth average in 1995 was around 25% compared to the previous year.

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[1] *Ministry of Tourism and Antiquities, statistics department.*

[2] *Jordan National Tourism Strategy 2004 – 2010, previous mentioned resource, p.10*

[3] *WTO, International Tourist Arrivals, 2006.*

It is worth mentioning that the tourism industry in Jordan has suffered, in a similar manner to that of most of the Middle Eastern countries, due to negative consequences related to the outbreak of the Palestinian Intifada, the volatile situation between Lebanon and the Israelis, and the consequences of the 9/11 attacks in New York.

Since 2003, the flow of tourists has started to recuperate from the awful losses that resulted from the aforementioned political circumstances. The number of arrivals to Jordanian destinations reached 4,599,243 in 2003, and over 5,817,370 in 2005, and then topped 6,528,626 in 2007[1]*.*

The inauguration of crossings, namely Wadi Araba in the south, and Jordan Valley in the north, between Jordan and the Israelis led to the appearance of new tourist packages that offer one day visits to Jordan as part of global packages made for Israel. Indeed, the Israeli tour operators put Petra in their packages to attract more tourists to Israel, hence it was very common to see tourists coming to Jordan in the morning through the southern crossing at Wadi Araba in order to visit Petra, Aqaba and Wadi Rum, and then return in the evening to sleep in Israeli hotels.

Despite the fact that increasing numbers of tourists were coming to Jordan as a consequence of these one day packages, they were not so useful or profitable for the Jordanian tourism industry however, because this kind of tourist does not spend much money during their visit to the country, paying only for entrance tickets to archaeological sites, and a few other modest expenditures.

The total number of one day tourists in 2002 reached about 2,292,544 compared with 2,384,474 overnight tourists, while during 2003 there were 2,246,618 one day tourists compared with 2,353,088 overnight tourists.

By 2004, there were 2,733,849 one day tourists compared with 2,852,807 overnight tourists, and this figure rose in 2005 to a peak of 2,810,813 one day tourists, while the overnight tourist number was about 2,908,539[2]*.*

5.2. The nationalities of the incoming tourists:

Jordan attracts tourists from various markets, and these people are coming to Jordan to experience and explore the cultural and archaeological attractions that are found throughout the country.

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[1] *Ministry of Tourism and Antiquities; Statistics department; 2008.*

[2] *Ministry of Tourism and Antiquities; Statistics department.*

However, it is obvious that sharing cultural or historical backgrounds, as well as living in a country which is close to Jordan, plays a role in increasing arrivals from specific nationalities.

The main exporting tourist markets to Jordan are:

5.2.1. The Arabian Gulf market:

This market represents tourists coming from Saudi Arabia, the United Arab Emirates, Bahrain, Kuwait, Qatar, and Oman, and it is one of the most important markets for the Jordanian tourism product. This is especially so due to the fact that these countries are geographically close to Jordan, and so tourists from these countries are able to travel here by land using their own cars to reduce the total cost of visit.

The Jordanian climate is an attractive factor for Gulf tourists, particularly that of the western parts of Jordan where the climate is predominantly Mediterranean in nature, being warm and sunny in the summer, compared to the desert climate in the major part of Arabian Gulf. Because of this, many tourists escape the excessively hot weather of the summer in their own countries, and go to Jordan for their vacation which is usually from the end of the school year[1].

This market has a specific value for the Jordan product, especially during crisis periods and the times of war outbreak, in that Arab tourists are less sensitive to the political crises in the Middle Eastern region as they are more able to distinguish between the actual war zones and the secure destinations in the Middle East, whereas European and American tourists have greater difficulty in understanding the real situation. This is especially the case because a lot of the media exaggerate the news, and sometimes they even confuse Jordan with the West Bank, Iraq, and Lebanon.

Indeed, the presence of Arabian Gulf tourists is more concentrated during the summer period, when certain cities such as Amman become quite crowded with these tourists. Actually, the high number of cars coming from the Arabian Gulf in the streets of the capital demonstrates this phenomenon[2].

The total number of arrivals to Jordan from these countries in 2002 was about 1,024,044, and among these there were 430,099 overnight tourists compared with 593,946 one day tourists. In

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[1] Qawqaza, Awwad Dakhel Allah; types and trends of arabic tourism in Jordan; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 2001, p. 56-57.

[2] Abu Aiyash, Abd Elah and et al; approach to tourism in Jordan; previous mentioned source; p. 152.

2003, the number of tourists was rather low at 929,648, and of these 390.452 being overnight tourists compared with 539,196 one day tourists.

By 2006, tourists from the Arabian Gulf reached 1,477,353, of these 832,592 being overnight tourists and 644,761 one day tourists. This can be compared with the 2007 figures which was a total of 1,299,673, of these 735,539 being overnight tourists and 564,134 one day tourists.

Looking at the figures by nationality, Saudi tourists are the most numerous nationality to visit Jordan, this fact being most likely due to the geographical closeness of Jordan and Saudi Arabia. In 2002 about 766,480 Saudi tourists came to Jordan, with 341,922 of these being overnight tourists, while in 2003 about 727,589 Saudi tourists visited, and among these were 305,587 overnight tourists.

In 2006, the number of Saudi tourists to Jordan increased significantly with 1,187,786 visiting, including 645,158 overnight tourists. By 2007, the tourist flow from Saudi Arabia had slowed down, with only 1,001,022 tourist arrivals including 543,715 overnight tourists.

Among the tourists from the Arabian Gulf, Kuwaiti tourists come in the second position, with 127,081 in 2002, but then a decrease in 2003 to 81,139 tourists. The number of Kuwaiti tourists had increased by 2006, reaching 140,545 tourists against 136,326 tourists in 2007.

As for the number of Bahraini tourists, there were 84,695 in 2002, 76,791 in 2003, then 80,638 tourists in 2006, and an increase to over 94.004 tourists in 2007.

As for the other countries of the Arabian Gulf, the number of tourists coming from UAE and Oman is still very low compared to those coming from other smaller markets such as Qatar and Bahrain[1].

The main characteristics of the Arab tourists coming to Jordan are as follows:

1. *Arab tourists usually come with their families.*
2. *The majority are individuals who come without consulting travel agencies or tour operators to buy organised packages. This is mostly related to the common cultural aspects that reduce the risk of travelling individually to Jordan without a tourist package.*

[1] *Ministry of Tourism and Antiquities; Statistics department; 2008.*

3. *Most Arabs prefer to stay in furnished suites and apartments as opposed to hotels, because Arabic families tend to be large, making suites and apartments more cost effective.*
4. *Arabs use land transport rather than other kinds of transport, such as air or sea. So many of the Arabs, particularly those coming from Saudi Arabia have their own cars with them which they use to move freely about, without any restriction.*
5. *Arabian Gulf tourism is predominantly leisure tourism, with most of these tourists looking for recreational activities and amusement facilities. Moreover, they like to attend music festivals, usually in Jerash or Amman, and also go shopping in the big commercial centres.*
6. *This tourism is also associated with the end of the school year and the summer holidays[1].*
7. *Gulf tourism is more concentrated in Amman and its vicinity, especially the surrounding mountains and natural parks. While some important sites like Petra and Wadi Rum do not attract so many tourists from the Arabian Gulf.*
8. *Generally, Gulf tourists visit Jordan along with visits to Lebanon and Syria.*

5.2.2. European market:

The European market is also an important market for the Jordan product, particularly as Europe is already a traditional market for the whole of the Middle Eastern countries[2]. Indeed European tourists were the first to come to Jordan for recreational purposes by seeing the amazing and charming city of Petra.

The European market includes both Western European tourists, from countries such as Italy, Britain, Germany, and France, and Eastern European tourists, with Russian tourists being highest on the list in terms of numbers according to nationality.

The total number of European tourists coming to Jordan in 2002 was about 442,128, and of these 313,469 were overnight tourists and 128,659 one day tourists, while they increased in 2003 to top 444,088, of these 314,858 being overnight tourists.

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[1] *Alrawadieh, Ziad; Golden Triangular..; previous mentioned source; p. 114.*

[2] *Royal Scientific Society; economics of tourism in Jordan; previous mentioned source; p. 70.*

In recent years, the number of European tourists has showed an increase compared to previous ones. In 2005, the number of arrivals coming from Europe was about 552,675, and of these 391,847 were overnight tourists, compared with 643,528 European tourists in 2006, of these 414,647 being overnight tourists. In 2007, the number of European tourists topped 869,117, and of these 570,861 were overnight tourists.

During the first quarter of 2008 there was an increase in the number of arrivals by 56.4% in comparison with the same period of 2007. This significant increase is related mainly to the selection of Petra as one of the New Seven Wonders of the World and the huge publicity campaigns associated with that event throughout the world[1].

Looking at the main European nationalities that visit Jordan, Britain comes top of the list with over 92,061 tourists in 2007 compared with 68,210 tourists in 2006, showing an increase of 35% in 2007.

In second position, are Russian tourists with a total number of 55,277 tourists in 2007 compared with only 25,309 tourists during 2006, this being an increase of more than 118.4%. Indeed, Russia has become one of the most growing markets for the Jordanian product.

Germany comes third with a total number of 45,484 tourists in 2007, followed by France (41,844), Spain (33,044), and Italy (29,543).

European tourists have certain particular characteristics such as the following:

1. *European tourists usually come to Jordan as part of organised package tours arranged by travel agencies and tour operators rather than visiting Jordan individually.*
2. *Europeans are more sensitive to certain issues, especially the degree of security and stability, and this probably explains why the tourist flow declined during the Palestinian Intifada, the Israeli invasion of Lebanon, and the invasion and occupation of Iraq.*

[1] *Ministry of Tourism and Antiquities; Statistics department; first quarter of 2008.*

3. *Europeans are more likely to prefer visiting archaeological, historical, and heritage sites. In fact, Prof. Samawi found in his study that 56.9% of tourists who had visited Petra were Europeans[1].*

4. *They are more likely to use classified hotels.*

5.2.3. North and South American market:

This market ranks in third position out of the most important markets for the Jordanian product. The North and South American market includes the USA, Canada, and the Latin American countries, and is considered to be one of markets that has been influenced most positively by the launch of the Peace Process in the Middle East. The number of arrivals in 1995, which was the year after the signing of the Peace Treaty between Jordan and the Israelis, grew by 32.3% in comparison with the previous year.

Notwithstanding the fact that tourists from the Americas, particularly those from the USA, prefer to visit European destinations such as Spain, Italy, Greece, and Turkey, they find the Middle Eastern destinations to also be very attractive, especially because this area is considered to be the centre of the ancient world where many civilisations lived, thus enriching the historical value of the region. Thus, many tourist packages are organised to attract tourists to visit destinations like Egypt, Lebanon, Jordan, Palestine, and Israel[2].

However, there has been an oscillation regarding the American tourist flow in accordance with the global political scene in the Middle East. Indeed, the total arrivals to Jordan from these countries decreased from 48,257 in 1989 to 38,538 in 1990, and to less than 23,978 tourists in 1991, because of the outbreak of the Second Gulf War between Iraq and the Allies led by the United States of America.

Following this, tourism had started to recuperate from the losses in this market, especially after the signing of Oslo and Wadi Araba Treaties. The arrivals showed an increase reaching 103,346 in 1995, and more than 107,676 in 1996. This positive performance continued until 2001 when the 11th September attacks happened in the USA, causing a considerable reduction in the numbers of tourists going to the Middle Eastern destinations, which of course include Jordan. So it was the

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[1] Samawi, Habes; tourism industry in Petra; an article published in the Derasat Journal which issued in the University of Jordan, Vol. 1; 1990; p. 61.

[2] Royal scientific society; Economics of tourism in Jordan; previous mentioned source; p. 72-73.

case that Jordan received about 62,930 tourists by 2001, and a slight increase in 2002 with 73,213 tourists.

After this catastrophic period, American tourists resumed their visits to Jordan at the beginning of 2003 when the number of tourists reached 91,073, with 64,545 out of these being overnight tourists, then increasing in 2005 to about 157,935, of these 111,976 being overnight tourists.

Arrivals increased in 2006 by more than 51% with about 199,120 tourists, of these 167,843 being overnight tourists, compared with 208,378 in 2007, 177,783 being overnight tourists[1].

The USA is the top of the list for numbers according to nationality for this market, with more than 78% of all tourists from North and South America being from the USA. The total number of tourists from the Americas market was about 162,811 in 2007.

In the second position comes Canada with more than 29,402 tourists, and then Mexico and Brazil[2].

The main characteristics of the American market are:

1. *The high sensibility to security and stability factors.*
2. *The visiting of cultural, historical, and archaeological sites.*
3. *The paying of particular attention to hygienic and environmental conditions.*

5.2.4. Asian market:

This market includes all Asian countries, except the Arab Asian countries, whether those in East Asia and the Pacific or in South Asia.

There were few tourists coming from these countries to Jordan at the beginning of the 1990's, but the number of arrivals has increased considerably. The total of these arrivals rose from only 15,336 in 1989 to over 47,877 in 1997.

The flow of tourists slowed down in 2001 when the total number of arrivals from East Asia was 38,401 tourists, and from South Asia only 24,791 tourists.

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[1] Ministry of Tourism and Antiquities; Statistics department, 2008.

[2] Ministry of Tourism and Antiquities; Statistics department, 2008.

From the beginning of 2002, Asian tourists started to come back to the Jordanian market, reaching 112,375 tourists, among these 79,674 overnight tourists, while there was a small decrease in the number of arrivals in 2003 which had declined to 100,021 tourists, 70,915 of these being overnight tourists.

Later, specifically from 2005, the Asian market started to grow, recuperating in such a manner that its position in the Jordanian market increased in significance. Indeed, Asian arrivals reached 151,172 tourists in 2005, among these 107,181 being overnight tourists, then increased to 185,549 tourists in 2006 among these 178,122 being overnight tourists, and increased yet further in 2007 to 198,331 tourists, of these 190,964 being overnight tourists[1].

Looking at tourist numbers by nationality, the top nation to visit Jordan in 2007 from the Asian market is the Indonesia, with 39,031 tourists, followed by India with 31,426 tourists, the Philippines with 19,400, Australia with 17,829, Sri Lanka with 16,325, South Korea with 12,811, and Japan with 12,532 tourists[2].

Here it should be mentioned that Asian tourists, especially those coming from certain countries such as Japan, Australia, South Korea, Singapore, and New Zealand, are considered to be very desirable because of their high spending rates in comparison with other nationalities. In fact, some studies highlight the fact that Japanese tourists spend approximately three thousand dollars each per trip, which makes such tourists very attractive and profitable[3].

5.2.5. Domestic tourism:

As a matter of fact, domestic tourism was not being taken into consideration all that much whether by tourism-related decision makers or academics and researchers. This might be related to the marginal economic impact of local tourists, due to the nature of these tourists who usually visit sites located near to where they live, meaning that they tend to bring with them what they need in terms of food and other equipment. By doing this they tend to avoid buying anything from the tourist sites where things are usually more expensive. Moreover, Jordanian tourists do not use hotel facilities as much as foreigners do.

[1] *Ministry of Tourism and Antiquities; Statistics department; 2008.*

[2] *Ministry of Tourism and Antiquities; Statistics department; 2008.*

[3] *Alrawadieh, Ziad; Golden Triangular; previous mentioned source; p. 114.*

In fact, this tendency on the part of domestic tourists to scarcely use hotels and other tourist facilities comes from the economic situation of Jordanians whose incomes tend to be low, as well as the nature of Jordanian families which tend to be large.

Recently, a number of public institutions and entities together with the private sector have started to see domestic tourism as a potential resource to exploit and develop. This change in dealing with different kinds of tourists sprang from the huge numbers of local tourists who had started to visit Aqaba after the launch of ASEZA. ASEZA was attracting Jordanians to visit Aqaba, as well as to go shopping there due to the various types of tax and customs exemptions. Since then, many travel agencies and tour operators have started to organise various tourist packages designed to fit the needs and expectations of domestic tourists needs.

In addition, it was the decline of foreign tourist demand itself that increased the level of interest in domestic demand, especially when the Intifada flared up, and then the attack of 11th September in America causing catastrophic consequences for the tourism industry, not only in the Middle East but in all destinations across the world.

To attempt to counteract the negative impact of these regional and international crises on Jordanian tourism activities, particularly in Petra, the JTB and the Tourism Ministry conducted an initiative in 2005 to rescue these activities by resorting to domestic tourism, launching very special promotional campaign which is considered a precedent in this field.

The initiative included stimulus funds for travel agencies and tour operators to encourage them to offer tourist packages that suit the economic conditions of Jordanians. These funds were covering up to 50% of the total cost of tourist packages in some cases, stimulating many Jordanians to visit various domestic tourist destinations, especially Petra, Aqaba, and Wadi Rum[1]*.*

Nevertheless, it is still difficult to measure the volume of domestic tourist flow, or its impact on the national economy, because of the lack of statistical tools that help to analyse it, as well as the fact that most domestic tourists do not usually use tourist accommodation facilities, preferring either to rent furnished suites and apartments or to be hosted by their friends or relatives.

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[1] *JTB launches an initiative to support travel agencies in the summer of 2005; an article written in Al-Sharq Al-Awsat Newspaper; Vol. 9722; 11/07/2005.*

MENA statistics show that during 2007 Jordan received about 750,054 Jordanian tourists from those working abroad, among these 744,202 overnight tourists, and 903,749 tourists in 2006, out of these 896,697 being overnight tourists[1].

5.3. Main attractions and destinations in Jordan:

The city of Amman is considered to be the most visited city in Jordan, and has hosted about 48% of the total hotel nights in Jordan. Indeed, Amman attracts various tourist categories be they Arab, (especially from the Arabian Gulf countries), non-Arab, or Jordanian emigrants who live abroad.

In the second position comes Petra with 23.3% of hotel nights, followed by Aqaba with 11.7%, the Dead Sea with 11.1%, and then Wadi Rum with 3.4%[2]. The hotel nights spent in the rest of the Jordanian destinations are much lower despite the fact that most of them are very rich in archaeological, cultural, and historical resources, such as Jerash and Umm Qais. It seems that these destinations are treated somewhat as secondary stops in the tourist itineraries.

It is also important to point out that the degree of attractiveness of each site, with the exception of Amman which attracts most kinds of tourist, varies according to the nationality of the tourist. For example, tourists coming from Europe, the Americas, and South and East Asia usually visit cultural, historical, and archaeological sites, and they like to see natural attractions as well. On the other hand, Arabian Gulf tourists, prefer to visit Amman and the mountain areas in its vicinity, while Jordanian tourists are more to be found in destinations like Amman, Aqaba, the Dead Sea, and mountain areas.

5.4. Purposes of visit:

The purpose of visit to Jordan varies greatly according to the nature of the Jordanian product which is able to satisfy the different categories of tourist who visit Jordan.

Studying the needs and purposes of tourists coming to Jordan and to the other competitive tourist destinations of the Middle East is fundamental in order to build the national tourism product in a manner that will be in harmony with tourist expectations.

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[1] Ministry of Tourism and Antiquities; Statistics department.

[2] Ministry of Tourism and Antiquities; Statistics department.

As we have already mentioned before, heritage sites and archaeological treasures are considered the main targets for European and American tourists. Abu Rahma (1991:57) found in his study that archaeological and historical value is the motive for 81% of Americans coming to Jerash, while this percentage was about 72.3% for the European tourists.

Arabs and Jordanians, on the other hand, visit Jerash mostly to attend Jerash festival events, however this festival has now been replaced by the Jordan Festival from the summer of 2008. Thus, recreational purposes are the first motive for more than 66.8% of Jordanians and 53% of Arabs, while cultural heritage is the purpose for only 27.2% of Jordanians and 43% of Arabs.

So, visitors to Jerash are most likely to be Europeans, this group being about 39.5% of the total number of tourists to Jerash, compared with only 24.7% being Jordanians, and 18.2% being Americans[1].

As for the archaeological city of Petra, Samawi found that 91.2% of the Europeans who visited it did so for its particularity as a unique site in the whole world, while this percentage was about 87.5% for the American visitors[2].

Indeed, most of the tourists who visit Petra are foreigners, accounting, for example, during 2005 for about 79.2% of the total number of visitors, while the presence of Jordanian tourists was far less.

In Madaba city, Al-Rabadi has pointed out that historical and archaeological importance is the first motive for 87.5% of visitors from Europe, while 62.3% of Jordanians visiting Madaba go there for its natural attractions. 54% of Arabs visiting Madaba go there for leisure and recreational purposes.

Lately, there has been an increase in religious tourism from Europe in comparison with Arab nationalities in general. This is more related to the historical churches and Christian sites that Madaba governorate encompasses. Moreover, Arabs and Jordanians are more present in the spas of Maen compared with Europeans and Americans[3].

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[1] *Abu Rahma, Hasan; Geography of tourism and recreation in Jerash; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1991; p.38.*

[2] *Samawi, Habes; tourism industry in Petra; previous mentioned source; p.67.*

[3] *Al-Rabadi, Zohour; tourism and recreation in Madaba governorate, Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 1996, p. 57-58.*

Historical value was also the first component of Karak governorate where 32.2% of Jordanian tourists come to see these historical monuments, Karak Castle in particular, compared with 23.6% of visiting Europeans, and 19.6% of visiting Arabs.

Religious tourism is also important in the product of Karak, since many Islamic shrines are inside the governorate perimeters especially in the province of Al-Mazar. These shrines attract religious Muslim tourists coming from various Islamic countries such as Iraq, Iran, Indonesia, and Malaysia[1].

Various tourist categories are attracted to Amman due to the wide range of categories that Amman is able to satisfy. While archaeological monuments like the Roman Theatre and Castle Mountain attract European and American nationalities, Arabs and Jordanians visit the city to enjoy its recreational facilities such as parks, great shopping centres, cinemas, amusement establishments, and nightclubs, in addition to seeing some of the pedestrianised streets like Al-Wakalat Street in Sweifyia quarter, Culture Street in Shmeisani quarter, and Rainbow Street near to the first circle in the downtown area.

Furthermore, conference tourism also has an important position in the Amman product, with the city hosting most of the conferences that are held in Jordan. By 2000, the number of conferences hosted by the city reached 249 conferences covering various subjects including the political, economic, cultural, and scientific[2].

In addition, curative tourism has had considerable success in Jordan, especially in the past two decades, with Jordanian hospitals receiving a huge number of Arab patients because of the good reputation that this sector has achieved. Moreover, Jordan attracts many tourists to its curative spas in Al-Hemma, Maen, Ifra, and the Dead Sea. The latter represents a great resource for attracting patients who suffer from dermatitis and rheumatism as well as other tourist categories such as Jordanians and Arabs in general who find the Dead Sea a splendid place to spend their vacations[3].

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[1] *Al-Nawaiseh, Younis; Tourism development in Karak Governorate; previous mentioned source, p. 37.*

[2] *Al-Rawashdeh, Akram Atef; Development and rehabilitation of tourism in Amman city; Theses Deposit Center; Main Library of the University of Jordan, University of Jordan; Amman 2001; p.48-54.*

[3] *Harahsheh, Salem; Curative Tourism in Jordan and It's potential Development; University of Bournemouth; UK, 2002, p. 28 – 97.*

On the other hand, Jordan has made great efforts to promote conference tourism by the Dead Sea, by giving generous incentives for investors to build good hotel facilities along the Dead Sea coast, and establishing a huge conference centre to give the Dead Sea area the capacity to host great events. Lately, the Dead Sea has been chosen as the location for the World Economic Forum, described on more than one occasion as being "as famous as the Davos Forum".

Most Jordanian tourists who go to Aqaba, go there either to enjoy swimming in the sea, to benefit from the wide range of tourist services offered in the city, or to shop, especially after the declaration of Aqaba as a Special Economic Zone in 2001, offering a number of economic incentives and exemptions whether to businessmen or to customers. The presence of Jordanian tourists in 2006 exceeded 66.3% of the total number of tourists that Aqaba had received[1].

Nowadays, the city attracts different categories of tourist such as business tourists, conference tourists, and various water sports tourists, such as diving and boat race enthusiasts.

In the vicinity of Aqaba is located the charming desert of Wadi Rum that encompasses several kinds of attractions for those who like to experience adventures in the heart of nature. The desert of Wadi Rum attracts Europeans rather than Jordanians or Arabs in general. During 2005, it received about 110,112 European tourists, compared with 4,367 Americans, and 6,429 Jordanians, while the tourists from the other Arab countries were only 1,835 tourists[2].

At the Baptism Site, which was the place where the baptism of Jesus Christ by John took place according to the holy Christian books, religious tourism has prospered considerably over the past few years. By 2005, the site attracted about 40,835 European tourists, while Jordanian tourists accounted for around 9,314 tourists, most of them Christian[3].

In Umm Qais, the city found in the north of Jordan, the presence of archaeological monuments such as ancient theatres and other ruins is considered to be the most attractive component for non-Arab foreigners, while Jordanians visit Umm Qais to enjoy its natural attractions, especially in the springtime. Indeed, statistics show that 68.8% of Jordanians who visited Umm Qais in 2005, did so in the period between March and April.

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[1] *ASEZA; Statistics department; 2007.*

[2] *Ministry of Tourism and Antiquities; Statistics department, 2006.*

[3] *Ministry of Tourism and Antiquities; Statistics department, 2006.*

The situation is not much different at the other archaeological sites such as Umm Jemal, Desert Castles, and the historical castles in Ajloun and Shoubak. Moreover, even the museums that are close to the tourist sites are for the most part disregarded by the Jordanian and other Arab tourists, while other nationalities such as the European and American nationalities are usually more interested to see the exhibitions and displays at these museums. For example, although the fact that Jordanian tourists represented 66.3% of the total number of tourists who visited Aqaba in 2005, few of them visited the museum of the city, (see Table No.12).

Table No.12: Number of Visitors to Touristic Sites by Location Jan-December, 2004-2005

Site	***Jan. - Dec. 2005***			***Jan. - Dec. 2004***		
	Total	***Jordanian***	***Foreign***	***Total***	***Jordanian***	***Foreign***
Petra	*393,186*	*81,868*	*311,318*	*310,271*	*99,720*	*210,551*
Jerash	*214,550*	*33,550*	*181,000*	*166,195*	*33,542*	*132,653*
Umm Qais	*186,228*	*136,715*	*49,513*	*211,913*	*168,793*	*43,120*
Nebo Mountain	*180,825*	*1,552*	*179,273*	*119,054*	*10,825*	*108,229*
Ajloun	*142,892*	*77,630*	*65,262*	*111,200*	*68,582*	*42,618*
Madaba	*138,712*	*1,158*	*137,554*	*87,354*	*1,152*	*86,202*
Wadi Rum	*129,178*	*6,429*	*122,749*	*66,438*	*2,925*	*63,513*
Castle Mountain	*124,749*	*11,831*	*112,918*	*94,145*	*10,839*	*83,306*
Karak	*109,306*	*10,330*	*98,976*	*76,613*	*7,950*	*68,663*
Baptism Site	*73,469*	*9,314*	*64,155*	*51,611*	*8,274*	*43,337*
Quseir Amra	*44,437*	*1,175*	*43,262*	*40,764*	*2,801*	*37,963*
Pella	*19,025*	*2,889*	*16,136*	*27,280*	*14,339*	*12,941*
Mekawer	*10,712*	*2,579*	*8,133*	*9,114*	*1,813*	*7,301*
Umm Jemal	*3,902*	*1,298*	*2,604*	*2,968*	*1,360*	*1,608*
Qaser Kharana	*22,072*	*548*	*21,524*	*32,097*	*1,739*	*30,358*
Popular Life Museum	*112,295*	*41,500*	*70,795*	*80,200*	*29,000*	*51,200*
Jordan Archaeological Museum	*121,050*	*11,750*	*109,300*	*88,650*	*10,550*	*78,100*
Aqaba Museum	*13,486*	*6,447*	*7,039*	*13,687*	*6,721*	*6,966*
Madaba Museum	*11,350*	*1,200*	*10,150*	*10,275*	*1,125*	*9,150*
Salt Museum	*2,735*	*1,702*	*1,033*	*2,964*	*2,008*	*956*
Total	***2,054,159***	***441,465***	***1,612,694***	***1,602,793***	***484,058***	***1,118,735***

Source: Ministry of Tourism and Antiquities

5.5. Length of stay in Jordanian tourist sites:

The average of length of stay in Jordanian hotels increased to 4.4 hotel nights in 2007 from 4.2 hotel nights in 2006. This average varies according to the nationality of the tourist, with African tourists recording an average of 1.8 hotel nights in 2006 compared with 2.4 hotel nights during 2007, Americans 2.7 hotel nights in 2006 and 3 hotel nights in 2007, tourists from Asia and the Pacific increased from 2.2 hotel nights in 2006 to 2.3 in 2007, while for European tourists the average length of stay in Jordanian hotels showed a decrease from 5.2 hotel nights in 2006 to 5.1 in 2007.

As for Arab tourists, there was an increase in the average length of stay which was 4.4 hotel nights in 2007 compared to 3.6 in 2006. However, the actual average length of stay for the Arab tourists is not very accurate, because many of these tourists use furnished apartments and suites instead of hotels. Thus, their average length of stay is most probably much higher.

Furthermore, length of stay also varies according to the season. While it is high during the months of March, April, September, and October, it shows some decrease in the other months, particularly January, February, June, and July[1], (see Table No.13).

[1] *Ministry of Tourism and Antiquities; Statistics department, 2008.*

Table No. 13: Average Length of Stay For 2007

Month	***Average 2007***
January	*3.5*
February	*4.0*
March	*4.6*
1st Quarter	***4.1***
April	*4.6*
May	*4.5*
June	*3.9*
2nd Quarter	***4.5***
July	*3.8*
August	*4.4*
September	*4.5*
3rd Quarter	***4.2***
October	*4.7*
November	*4.5*
December	*4.4*
4th Quarter	***4.5***
Total	***4.4***

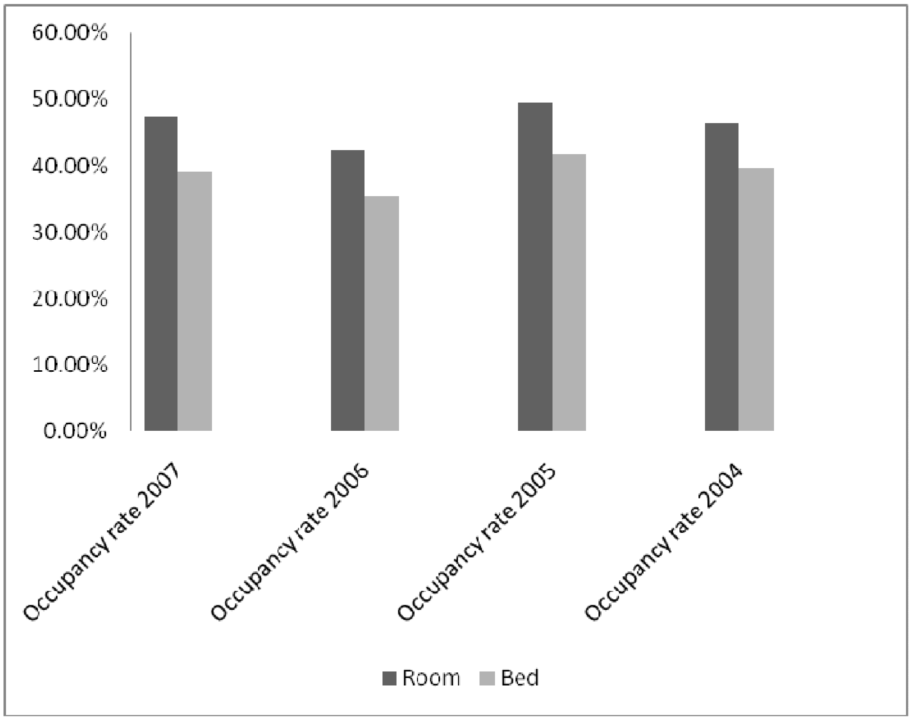
Source: Ministry of Tourism and Antiquities

On the other hand, for some Jordanian destinations like Amman, Aqaba, Petra, the Dead Sea, and Wadi Rum there is a high stay average, while for others such as Jerash, Umm Qais, and Ajloun the stay average is lower, despite the fact that these places have many precious archaeological and historical monuments.

5.6. Occupancy rate in Jordanian hotels:

The occupancy rate in Jordan witnessed some increase during 2007, recording 47.3% of total hotel rooms compared to 42.4% in 2006. The highest occupancy rate in the classified hotels has been during August when it reached about 59.5% of the total number of hotel rooms, (see Figure No.5).

Figure No.5: Occupancy rates in the past years



Source: Ministry of Tourism and Antiquities

The occupancy rate in the furnished apartments and suites slowed down in 2007 to 50% compared to 50.1% in 2006, and it recorded the highest occupancy rate during August by reaching about 78.7% and then in July it was 71%. This is related to the high numbers of Arabian Gulf tourists who come mostly in the summer season.

As for the campsites, which are mostly in Wadi Rum, the occupancy rate of these is usually very low, with around 13.9% in both 2007 and 2006. The highest rate was about 31.4% in April, followed by October with 27%.

Youth hostels have good occupancy rate, recording in 2007 around 55.4% of their total carrying capacity, the high rates being during March, April, and May. Most of these hostels are located in Amman, Aqaba, and Petra[1]*, (see Table No.14)*

It is noticeable from the official data that occupancy rates are not the same in all of the Jordanian sites. In 2007, the occupancy rate was high in Amman with 53.4%, and it had reached a high of 71.1% during August. In Aqaba, the occupancy rate was lower with only 46%, where both July and August were the highest with 58.4%. Petra, on the other hand, had an occupancy rate of 38.2%, the best performance being during October when an occupancy of 62.3% of the total hotel rooms in the city was recorded.

At the Dead Sea, the occupancy rate reached 71.5% in 2007 and the peak was in November with 98.4%. The occupancy for the rest of the Jordanian cities was as follows: Irbid 26.7%, Maen Spa 22.3%, Madaba 36.2%, Zarqa 4.3%, Azraq 2%, Ajloun 5.9%, Karak 11.6%, Jerash 40.6%, and Fuheis 4.6%.

On the other hand, these rates are higher than those for the first class hotels. The highest was in the four star hotels with 63.1%, then five star hotels with 61.6%, while it was 31.8% for the three star hotels, 36% for two star, and only 25% for the one star hotels[2]*.*

[1] *Ministry of Tourism and Antiquities; Statistics department, 2008.*

[2] *Ministry of Tourism and Antiquities; Statistics department, 2008.*

Table No.14

Occupancy Rates in the Classified Hotels																									*TOTAL*	
Month	***JAN***		***FEB***		***MAR***		***APR***		***MAY***		***JUN***		***JUL***		***AUG***		***SEP***		***OCT***		***NOV***		***DEC***		***2007***	
	Room	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*	*Room*	*Bed*
Occupancy rate 2007	32.7%	26.5%	39.6%	30.5%	43.9%	36.3%	52.6%	44.0%	48.5%	39.2%	46.6%	36.9%	52.3%	44.3%	59.5%	51.9%	43.2%	35.3%	52.1%	44.3%	52.9%	42.8%	43.5%	35.3%	47.3%	39.0%
Occupancy rate 2006	33.3%	28.2%	38.0%	29.9%	42.4%	34.4%	51.8%	45.9%	47.1%	38.8%	41.1%	34.4%	50.6%	44.0%	50.8%	44.0%	39.8%	32.5%	33.4%	29.0%	42.7%	33.5%	37.2%	29.8%	42.4%	35.4%
Occupancy rate 2005	38.6%	33.3%	42.1%	34.1%	50.0%	42.3%	57.8%	50.3%	52.4%	44.6%	48.2%	39.0%	58.4%	50.3%	62.1%	56.2%	62.5%	46.9%	42.1%	37.7%	43.1%	36.2%	35.1%	28.3%	49.4%	41.7%
Occupancy rate 2004	35.5%	27.7%	40.0%	35.9%	40.6%	33.7%	55.3%	47.3%	45.7%	37.4%	41.7%	35.3%	53.7%	48.6%	59.7%	59.4%	52.5%	44.5%	48.5%	39.7%	41.8%	33.5%	40.6%	32.5%	46.4%	39.7%

Source: Ministry of Tourism and Antiquities

Chapter Six

Research Methodology

6.1. Local system of tourist supply:

Studying the tourism system for any destination requires a profound exploration of its main aspects, such as land, resources, services, tourist destination management, and various stakeholders, such as the tourists themselves, investors, tourist establishment managers, public institutions, experts and academic staff, and the local community. Bringing together all these components eases the planning process of the respective tourist destinations, and aids decision making and the implementation of the appropriate policies[1].

Indeed, it is necessary to have the presence of fundamental elements such as natural resources, cultural resources, infrastructure, super-infrastructure, transport and accommodation facilities in order to reach what is known as an Integrated Tourism System[2].

Other scholars, (Rispoli and Tamma[3] *1995, Della Corte*[4] *2000), have found that there is a strong relationship between land, tourist supply, and the local system that governs and manages the various sectors of the tourism product.*

Obviously, it is essential to have a high degree of coordination between all stakeholders in the tourism industry, since it is illogical to divide the tourism product into its basic components and sell each of them individually. Thus, to build a successful tourism industry requires building very strong networks between the various suppliers of transport, accommodation services and tourist attractions[5].

Tamma (2000) distinguishes between two concepts when talking about the "Tourist Destination", the first one identifies the tourist destination according to the geographic aspect (Place/Tourist

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[1] *Gummesson, Evert; Qualitative Methods in Management Research: Qualitative Methods, SAGE, 1999, p. 11-13.*

[2] *Abu Aiyash; An approach to tourism in Jordan; previous mentioned source, p. 43-52.*

[3] *Rispoli M., Tamma M, Risposte Strategiche alla complessitià; Le forme di Offerte dei prodotti alberghieri, Giappichelli, Torino, 1995.*

[4] *Della Corte, V.; La Gestione dei sistemi Locali di offerta turistica, Cedam, Padova, 2000.*

[5] *Della Corte, V; and Mauro Sciarelli; Evoluzione Del Marketing nella Filiera Turistica: il Roulo dell' information and communication Technology; congresso Internazionale "Le Tendenze Del Marketing"; Università Ca' Foscari, Venzia, Nov. 2003, p.3.*

district), while the second represents the tourism product in a specific region, including resources, activities and events[1].

On the other hand, some scholars, (Barney, 2001; Priem and Butler[2], 2001; Makadok, 2001; Williamson[3], 1999; Della Corte and Sciarelli, M.[4]), consider that resources can be the competitive advantage in itself. This depends on the characteristics of the resources and to what extent it is possible to imitate or substitute these resources.

6.2. Destination Management and Governance:

The management of tourist destinations and the governance of various economic sectors, in particular the tourism sector, are very important to enhance development strategies in these destinations. In fact, concepts like "Governance" and "Destination Management" are some of the main topics dealt with in the economic studies that are concerned with strategic-managerial approaches, (Laws, Eric; Noel Scott and Nick Parfitt[5], 2002; Gunn[6], 1988; Cooper[7], 1995).

Furthermore, governance was at the core of plans and strategies that aimed to improve the quality of life in the developing countries, and the concept of "Good Governance" was spread, implying various tools through which public institutions and bodies can interact positively with other partners and stakeholders (political forces, social organisations, economic players, citizens, and so

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[1] Tamma, M., Destination Management: Gestire Prodotti e Sistemi Locali di Offerta; in (Franch M., Destination Management: Governare il Turismo tra Locale e Globale; Giappichelli, Torino, 2002, p. 18

[2] Priem, R.L, and J.E., Butler; Is the Resource-based "View" a useful perspective for strategic management research?; Academy of Management Review 26 (1), 2001, p. 22-40

[3] Williamson, O.E., Strategy Research: Governance and Competence Perspective; Strategic Management Journal 20 (12); 1999, p. 1087 – 1108.

[4] Barney, J.B.; Della Corte, V; Sciarelli, M; Strategic Management Research at Crossroads: Resource-based Theory and Its Managerial Implications, unpublished article.

[5] Laws, Eric, Noel Scott and Nick Parfitt; Synergies in Destination Image Management: a case study and conceptualization; International Journal of Tourism Research 4, 2002, p. 39-55

[6] Gunn, C.A., Tourism Planning; Taylor and Francis; New York, 1988

[7] Cooper, C., Strategic Planning for Sustainable Tourism: the case of the off shore islands of the UK; Journal of Sustainable Tourism 3 (4), 1995, p. 1-19.

on), and then be able to conduct the right strategies and make the right decisions that lead to the development of the country[1].

Other scholars, (Murphy, P.; and Murphy, A.), found that the governance quality of various institutions and bodies, whether in the public or private sector, impacts on the level of performance in all product life phases, such as production, promotion and marketing, and distribution[2].

Others, (Wilson et al[3]*, 2001; Goodwin*[4]*, 1998; Pender, Lesley and Richard Sharpley*[5]*, 2005), considered governance to be a fundamental approach and a good tool that can be used to realise a strong partnership between the public and private sector as well as involving the relevant stakeholders in the tourism industry, especially local communities.*

The relationships between the various components in the tourism industry should be organised in a formalised manner, in order to include all parties in the decision making process regarding the implementation of development strategies and projects. With such a level of coordination, all stakeholders will feel and behave as active partners in the management and governance of the tourist destination.

In the past, "Governance" and "Destination Management" were always connected to public sector bodies, since government shoulders the responsibilities of the implementation of various strategies that aim to develop and manage the destination, including the enactment of the laws and regulations that suits its visions and strategies. Lately, these concepts are no longer referring only to the public sector's decisions or policies, especially since many countries in the world, among them Jordan, have decided to conduct wide economic reforms by adopting privatisation programmes and market driven policies with the aim of giving the private sector the role that it deserves. These new policies have made the private sector an important component of governance and destination management.

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[1] *Zimmermann, Willi; Good Governance in Destination Management; edited by Jamieson, Walter; Community Destination Management in Developing Countries; Haworth Press, 2006, p. 114.*

[2] *Murphy, P. ; and Ann E. Murphy; Strategic Management for Tourism Communities; Channel View Publications, 2004, p. 127.*

[3] *Lowndes, Vivien; and David Wilson; Social Capital and local Governance: Exploring the institutional Design Variable; political Studies, Vol. 49, 2001, p. 629 – 647.*

[4] *Goodwin, M; the Governance of Rural Areas; Some Emerging Research Issues and Agendas; Journal of Rural Studies Studies Vol. 14, No.1, 1998, p. 5-12.*

[5] *Pender, Lesley; and Richard Sharpley, The Management of Tourism; SAGE, 2005, p. 181*

In addition to the involvement of relevant stakeholders in the tourist destination, policy makers should take into consideration other important issues in order to reach the expected results of "Good Governance" implementation. Of these issues, ones that have to be considered include the risks faced by declining natural resources and the challenge of trying to protect them, the degree of competitiveness in the face of other heritage and cultural sites, the influence of demographic indicators, social changes, and technological progress[1].

6.3. Networking between tourism enterprises:

As has been pointed out previously, the coordination between various tourism sector players becomes an absolute necessity, especially with the extreme competition that exists between the Jordanian tourist destinations and the neighbouring tourist destinations in the MENA area, and the progress that the tourism industry and its products have witnessed in the last two decades.

Networking is a good path to increase the degree of coordination and to enhance partnership between tourism enterprises. Networks can be established on a geographical or on a professional basis, or upon both of these in some cases. Such networking helps to make tourism planning more organised globally in the area, and to facilitate the exchange of experience between players in the same field.

Nowadays, each tourist destination seems to operate as an open system in which different interdependent stakeholders provide goods and services with each provider relying to some extent on the other providers in order to function effectively[2].

In relation to this, the concept of "Networking" represents the process of building bridges between the various firms and businesses to gather them under one umbrella with the aim of developing an expansion policy that will enable them to realise their common interests. These networks can be used to build strong relationships between suppliers, purchasers, and even competitors in the market, (Nalebuff and Brandenburg[3]*, 1996; Dennis*[4]*, 2000).*

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[1] *Jamieson, Walter; Community Destination management…, mentioned resource, p. 158*

[2] *Lazzeretti, Luciana; and Clara S. Petrillo; Tourism Local systems and Networking; Elsevier; 2006, p. 116.*

[3] *Nalebuff, B.J., and Brandenburg A.M.; Co-operation; Harper Collins Business, Philadelphia; 1996*

[4] *Dennis, Cheryl; Networking for Marketing Advantage; Management Decision 38 (4), 2000, p. 287 – 292*

The importance of networking between tourism enterprises became a necessity in the face of the enormous challenges that emerged from the various changes that there have been in recent years in the world economy. Among these changes, is the greater tendency in the world to shift into market-driven policies, opening national markets to foreign investment, ending the protection of domestic products against imported products by the imposition of high taxes and customs, and the impact of globalisation that has extended over all economic sectors. Such a situation forces national, regional, and transnational enterprises to change their strategies and start networking with others in the field[1].

In recent years, the concept of the "Cluster" has emerged to describe the network which is established between service suppliers in the face of severe competition in the international markets. The concept is based on the linkage and interdependency principles between several enterprises working in the market. In other words, a "Cluster" is different from the traditional networks that gather together in a horizontal manner firms and enterprises that work either in the same markets, or produce the same service, since it can also take a vertical structure by networking between enterprises with dissimilar activities, and it may involve public bodies and institutions in an effort to improve the characteristics of the national product in order to be more competitive in the tourism markets[2].

According to many scholars, clusters are divided into two types:

1. *Regional Clusters:*

Porter[3] (1998) defines a cluster as a cooperative project that unites institutions and enterprises working in a specific geographic area. The spirit of cooperation is more prevalent at the inception of the network, but it may change into a more competitive spirit when partners start to divide among themselves the fruits of that cooperation, (Pyke and Sengenberger[4], 1992).

2. *Inter-firm Cooperation in Clusters:*

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[1] Lemoine, W.; and Lars Dagnas; Globalization Strategies and Business Organization of a Network of Logistic Service Providers; International Journal of physical Distribution and Logistic Management, vol. 33 No.3, 2003, p. 209 – 228.

[2] Enright, Michael J.; and Brian H. Roberts; Regional Clustering in Australia; Australian Journal of Management, 2001.

[3] Porter, M.E., Cluster and The New Economics of Competition, Harvard Business Reviews, 1998, p. 77 – 90.

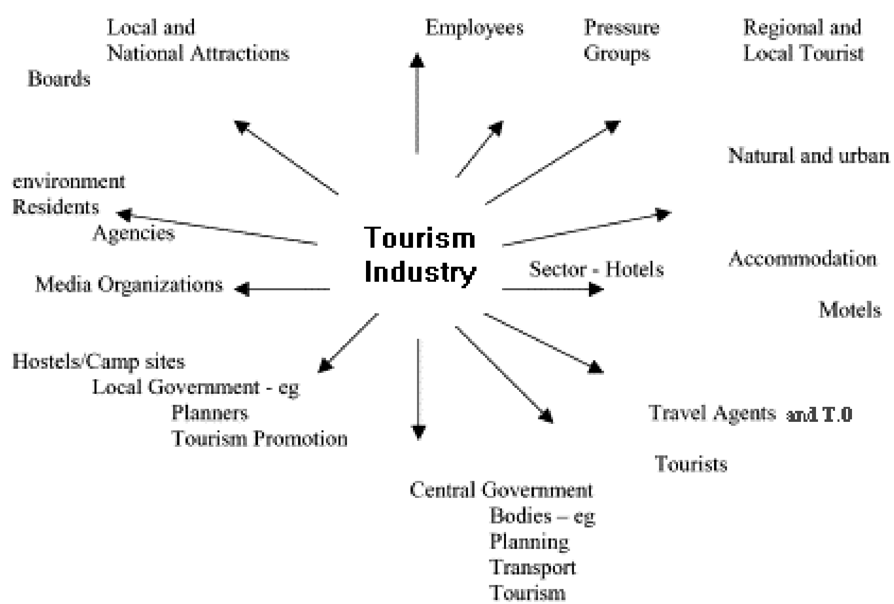
[4] Pyke, F.; and w. Sengenberger, Industrial Districts and local Economics Regeneration; International Institute for Labour Studies, Geneva, 1992

These clusters, on other hand, don't consider the geographical limits very much in the networking process between enterprises. Instead of that, they are based on the cooperation established among those firms that are working in the interdependent sectors, enhancing in this way the vertical integration between them[1]*.*

6.4 Stakeholders in the tourism industry:

Stakeholder Theory deals with all the relevant parties that have a legitimate interest in the activities or may be influenced positively or negatively by the project conducted, whether as a group or individually. In the tourism industry, stakeholders can include quite diverse categories, such as tourists, employees, suppliers, purchasers, public institutions, competitors, the local community, and any other components engaged or with an interest, (see Figure No.6)

Figure no.6: Main Stakeholders in Tourism Industry



Thus, the tourism firm should interact and cooperate positively with all stakeholders who have the moral right to contribute to the decision making process whether directly or indirectly, since they have a legitimate interest, (Freeman[2]*, 1984; Donaldson and Preston*[3]*, 1995; Jones*[1]*, 1995).*

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[1] Huybers, Twan; and Jeff Bennett; Inter-firm Cooperation At Nature-based Tourism Destinations; the Journal of Socio- Economics; 32, 2003, p. 571- 587.

[2] Freeman, R.E., Strategic Management: A Stakeholder Approach; Boston, Pitman, 1984

[3] Donaldson, T.; and E. Preston; The Stakeholder Theory of The Corporation; Concepts, Evidence, and Implications, Academy of Management Review, 1995, p. 65 – 91.

Moreover, it is necessary to study the real exigencies and needs of these parties in order to understand the nature of the Jordanian tourism product, as it represents the result of joint efforts and contributions made by all the stakeholders involved in the production, marketing, and distribution phases.

However, bringing all these stakeholders together is no easy task, since for the most part they have somewhat conflicting interests which are difficult to be satisfied all at the same time. Obviously, each of them tries to maximise their returns and benefits, and to retain power without accepting in most cases the sharing of these authorities with others. It can be noted that reaching the minimum level of coordination is fundamental to improve the performance, (Gunn[2], 1988; Jamal[3], 1995).

Indeed, talking about stakeholders, we can see to what extent the two components of the tourism industry, ie: resources and services, are interacting, and how they divide and share responsibilities and authority. Here, Jordan can be a good example where many parties are engaged in the tourism sector whether from the public side such as the Ministry of Tourism and Antiquities, the Jordan Tourism Board, ASEZA, the Petra Region Authority, and the Jordan Valley Authority; and also from the private sector such as the tour operators, travel agencies, Royal Jordanian Airlines, and tourist transport companies; or from other relevant parties such as the tourist police, societies that aim to protect heritage and the environment, and so on.

6.5. Resource–Service-Governance Framework:

As it has been pointed out before, Resource-based Theory (RBT) draws a connection between the various components in the area, whether tangible or intangible, renewable or exhaustible, and the evolution and sustainability of the tourism product. Moreover, the theory draws a strong connection between the availability of resources and the competitive advantage of the product, emphasising that competitive advantage is higher when the resources are rare or difficult to reach for political, geographical, or economic reasons, (Barney[4], Della Corte, and Sciarelli M.).

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[1] *Jones, T. M.; Instrumental Stakeholder Theory: A Synthesis of Ethics and Economics; The Academy of Management Review, 1995, p. 404 – 437*

[2] *Gunn, C.A.; Tourism Planning, Taylor and Francis., New York, 1988, p. 272*

[3] *Jamal, Tazim B.; and Donald Getz; Collaboration Theory and Community Tourism planning; Annals of Tourism Research; Vol. 22, No1, 1995, p. 186 – 204*

[4] *Barney, J.B.; Della Corte, V; Sciarelli, M; Strategic Management Research at Crossroads: Resource-based Theory and Its Managerial Implications, unpublished article.*

As a matter of fact, many of the strategic-managerial theories have explored the factors that determine the performance level in any firm, the circumstances that affect the decision making process inside the firm, and to what extent these factors and circumstances influence the development strategies.

Based upon the aforementioned, I have chosen to demonstrate the nature of the Jordanian product by focusing on the three main aspects which are: resources, services, and governance. These three elements can help to focus on the tourism industry, showing the problems and obstacles that may impede its progress.

It is quite clear that the first dimension of the framework (Resources) represents the cornerstone from which to launch any tourist destination by exploiting these resources that can attract both tourists and investors.

The analysis of tourism resources in Jordan is considered necessary before putting into place any global master plan for development. Moreover, exploring the nature of resources in Jordan leads us to put in order our priorities of work, focusing on the economic projects and programmes that can generate rapid and sustainable economic results.

The resources to be analysed are not only natural ones, but also ones that are human fabricated which can attract tourist flow to the destination, such as amusement facilities, museums, music festivals, and similar things.

The second dimension (services) also has a crucial role in the life of the tourist destination. Indeed, a destination with poor tourist facilities (accessibility, accommodation, food and beverage services, and entertainment) will not be able to attract the numbers of tourists that it deserves even if it is rich in resources.

The relationship between the quality of the services in the area and the growth of the tourist destination is reciprocal and is in direct proportion. At some archaeological or natural sites, the high incoming tourist flow to the sites increases public interest and encourages the government and local authorities to enhance the service facilities with the aim of guaranteeing the sustainability and continuity of this flow to their attractions. While in the abandoned sites, on the other hand, the government can find in the enhancement of service facilities an effective tool to attract tourists.

Here, we have to differentiate between two types of service: the first includes primary services whether for tourists or locals, such as transport, accommodation, restaurants, shops, and other services.

Meanwhile the second represents all kinds of services that encourage tourists to lengthen their stay in the destination, such as amusement establishments, cinemas, museums, large shopping centres, parks, and suchlike.

The third dimension of the framework is Governance, and here we highlight the impact of policies and strategies adopted by both the public and private sectors to develop the tourism industry in the country. The form of the role played by governance is extremely crucial and significant in the development of tourist sites. In most cases, this role is assumed by government bodies, politicians, and decision makers who undertake practical procedures to realise their visions.

Moreover, the concept of "Governance" sheds some light on the managerial aspects of the tourist destination, the degree of coordination between the various stakeholders, and the role given to those stakeholders in terms of the policies and strategy making. Indeed, many countries , especially the developing ones, have started to involve the private sector more in the planning process since it has became an important partner on the development path. Jordan, for example, has launched a great initiative that aims to bridge the gap between the private and public sector, and to build an integrative relationship between them instead of a hostile and unfriendly one.

Finally, the concept of "Governance" helps us to use the resources in an ideal way, taking into consideration the necessity of conserving them and protecting them.

To conclude, the framework selected (Resources-Services-Governance) seems to be good approach to explore the nature of the Jordanian tourism industry by studying each dimension individually and understanding the type of relationship that exists between them, and how much the degree of development of each influences their performance on a global level.

This framework was used in all of the research phases (whether before or during the research), focusing on the aspects that actually represent the real situation of the Jordanian product.

6.5.1. The choice of research methods:

In this research, the author has attempted to combine quantitative methods with qualitative ones in such a manner that makes the analysis of the Jordanian tourist system more compatible with the "Resources-Services-Governance Framework".

The author has chosen the tourist sites carefully in order to give an overall impression of the Jordanian tourist area. The degree of development in these sites is not the same, with some of them being rich in resources, but suffering from a lack of services. Others have an acceptable level of both services and governance, even if they are poor in terms of tourist resources.

The study relied on information gathered from several public sources, particularly those of MOTA, the JTB, ASEZA, the Statistics Directorate, Jordan Central Bank, and so on. Information and statistics such as this was very useful in describing the evolution of the tourism sector over time.

In addition, the Resource-based Theory was an important reference for the framework used. The theory helped to build the framework which measures the availability of the three components, (resources, services, and governance), in the tourist destinations.

To get such a result, the author used two different surveys in order to explore the tourism industry; the first one was by distributing a questionnaire to tourists coming to Jordan. 233 copies were distributed in five destinations, and included various multiple choice questions to explore tourists' opinions on different issues such as: the nature of the resources and attractions, the quality of the service in the hotels and restaurants and to what extent the tourists were satisfied with these services, the cost of services, and the quality-price relationship and whether the price reflects the quality of the products offered. In addition, tourists were given the opportunity to evaluate the Jordanian product by highlighting the main characteristics of the product as well as its strong and weak points.

Indeed, the category of tourist turned out to be a very important factor, as their opinions represent an indirect indicator on the comparison that tourists make between the Jordanian destinations and the other destinations that they have visited, since most of the tourists had had experience of various tourist sites around world. Thus, their experience can be regarded as a rich resource for the study.

Moreover, the author carried out some interviews with people to explore their points of view. The questions were composed of mixed, open and closed questions, and some of them were similar to *the questions given to tourists. Open questions have the effect of making the interviewee feel free to present their attitudes about various problems to do with the tourism sector in Jordan such as: the participation of the private sector in the decision-making process, the relationship between the private and public sector, the adequacy of laws and regulations for tourism sector needs, the degree of satisfaction with the efforts made with the promotion of the Jordanian product, and the availability of information and data that enables the measurement of performance at both the micro and the macro level. Furthermore, interviewees answered questions related to their expectations about how the product should be, and what are the forms of coordination or cooperation to be conducted with the neighbouring tourist destinations with the aim of attracting more tourists to the Middle East.*

100 interviews were conducted in the five tourist destinations selected. In addition, the author has divided the interviewees into four categories in order to build a holistic image for the tourism industry in Jordan. These categories are:

1. *Public Administrators (in tourist public bodies):*

These were administrators working in MOTA, JTB, ASEZA, the Antiquities Directorate, Petra Region Authority and so on, and they were interviewed in an attempt to better understand their opinions about the aforementioned issues, and to find out about their points of view on the role that should be given to the private sector in the process of building, management, and promotion of the product.

2. *Managers of private tourist enterprises:*

This category includes managers of hotels, tourist restaurants, travel agencies, tourist transport companies, and other tourism enterprises. The study explored their points of view regarding the national product and how to enhance it, and the adequacy of legislation to deal with the real exigencies and needs of the tourism sector.

3. *Investors:*

Since investments are very necessary to develop the tourism industry in Jordan by building various kinds of facilities that tourists need during their stay in any destination, interviewing investors helps us to understand the investment environment in Jordan and whether it is attractive or not, and to what extent economic incentives and privileges encourage foreign capital to enter the Jordanian *market. Moreover, through interviews, investors give their attitudes towards the public procedures created in order to facilitate their entrance into the market.*

4. Experts and academic staff:

This category includes experts working in the tourist fields and professors who teach tourism-related subjects in the Jordanian universities. Indeed, this category is very useful for research purposes as it gives a scientific analysis for the current situation of the tourism industry in Jordan, and this can be extremely helpful in understanding these destinations.

6.5.2. Sites selected to be study fields:

6.5.2.1. Amman:

Amman is the capital of Jordan as well as being the biggest and the most important city in Jordan. The city was built by the Ammonites who called it Ammon, and subsequently it was occupied by the Romans and renamed Philadelphia. During the time of the Islamic Empire, Amman had been abandoned, and the other neighbouring cities such as Baghdad and Damascus grew considerably and became the main centres for the Islamic state. This situation remained until 1921, when Prince Abdullah Bin Al-Hussein decided to choose Amman as the capital of Jordan, and from that date onwards Amman grew rapidly. Recently, the population of Amman has been estimated to be over two million people[1].

The main attractions of the city are the Citadel, the Roman Theatre, its modern buildings, shopping centres, and famous streets such as Wakalat, Thaqafa, and Rainbow.

6.5.2.2. Jerash:

Jerash is an interesting archaeological city in Jordan, especially due to the fact that it is one of the Decapolis League cities, (most of these are in Jordan, being built by the Romans as fortifications).

The city encompasses many important treasures including ancient theatres (northern and southern theatres), paved and colonnaded streets, temples (like the Temple of Artemis), churches (about 15), fountains, baths, and spacious squares[2].

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[1] *Al-Sallal, Aideh; Archaeological and tourist sites in Jordan; Imam Ali Library publications, Zarqa, 2003; p. 105-117.*

[2] *Shehab, Osama Yousef; Jerash: its history and civilization; Al-Basheer publications, Amman; 1988; p. 155-196.*

6.5.2.3. The Dead Sea and Madaba:

The Dead Sea and Madaba attract many religious tourists who come to visit the wonderful churches built in Madaba and at Nebo Mountain, and the Bethany site located near to the Dead Sea. Moreover, other tourists come for curative and recreational purposes especially to the Dead Sea and the sites near to it.

Madaba is a city that was built by the Arab Moabies state whose capital was Dhiban, and it encompasses a lot of outstanding and enchanting sites like St. George's Greek Orthodox Church, which contains a remarkable mosaic map. In Nebo, also, there are important churches and monasteries.

Recently, the Dead Sea has become a fundamental component of the Jordanian product, benefitting from being close to the Christian sites of Madaba and Nebo Mountain. A huge amount of capital was invested in hotel and recreational activities on its coast[1].

6.5.2.4. Petra:

Petra has a special position on the Jordanian tourist map, since it is the most famous site in Jordan which has also become the brand of the national product that is used in the marketing strategy.

The city, which was the capital of the Nabatean state, is rich with monuments, starting from the narrow passage (Siq) that leads to the spectacular Treasury (Al-Khazneh), which many archaeologists think is probably a Nabatean temple. In addition, there are several sites, such as the carved theatre that has capacity for 3,000 spectators, the High Place of Sacrifice, Urn Tomb, the Byzantine Church, The Great Temple, Crusader Castle, and Qaser Al-Bint[2].

6.5.2.5. Aqaba:

Aqaba is considered to be one of the main pillars of the Jordanian economy, as it is a unique Jordanian seaport. Moreover, it receives many tourists every year, particularly domestic tourists, who go there to enjoy swimming in the sea and the beaches, as well as having fun with the various recreational activities organised in the city.

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[1] *Al-Sallal, Aideh; previous mentioned source; p. 203-212.*

[2] *Alrawadieh, Ziad; The Golden Triangular ….; previous mentioned source, p. 22-29.*

Shopping is also one of the main motives for visiting Aqaba, particularly after the launch of Aqaba Economic Zone which offers the opportunity to go shopping for bargains, benefitting from the economic incentives and exemptions.

Aqaba also has another competitive advantage related to its proximity to the Wadi Rum desert that attracts huge numbers of tourists who come to explore its marvellous attractions, or to enjoy sports such as hiking[1].

[1] *Alrawadieh, Ziad; The Golden Triangular ….; previous mentioned source, p.29-30.*

Chapter Seven

The National Tourism System in Jordan

Reality and Vision

7.1. Tourism resources in Jordan:

This study included interviews with different players, especially those involved directly in tourist activities, (investors, managers in the private sector, public administrators, and experts), in order to explore their points of view about Jordanian tourism resources.

According to the interviewees, tourism resources in Jordan have the following characteristics:

1. *The Jordanian product is very miscellaneous. On the historical level, it encompasses archaeological resources that belong to Nabatean, Greek, Roman, Byzantine, Islamic, and modern periods. As for the natural resources of Jordan, these are a combination of desert and mountains. While, on the other hand, Jordan has three different climates that characterise it: a desert climate in the eastern and southern Jordanian areas, a semi-tropical climate in Aqaba, Aghwar, and around the Dead Sea; and a Mediterranean climate in western part of Jordan which is inhabited by the major part of the population.*

2. *Some of the resources of the country seem to be abandoned, and facing the risk of extinction. In Umm Qais, in the north of Jordan, for example, government interest in the tourism resources over there is still very weak, and no effective efforts have been made to put Umm Qais on the tourist map, which means that the site still remains undiscovered. The interviewees think that financial difficulties are the main reason for the lack of development projects in these sites.*

3. *The lack of a global master plan with the aim of developing and improving the tourist sites in Jordan. Actually, such master plans were made for some sites like Amman, Aqaba, and the Dead Sea, while others like Petra, Wadi Rum, and Jerash, are still without this kind of global planning.*

4. *The carelessness of the local community regarding these resources, and the negative behaviours that might affect and threaten the existence of cultural and archaeological sites. One of the experts that the author met commented on this issue saying:*

   "Local communities in the vicinity of tourist sites are not aware enough of the important value that these sites represent. If you go to Petra, you will see some writings and drawings on the rocks, while some locals cut rocks to make coloured sand bottles and then sell them to the tourists".

5. *Investors not being willing enough to exploit the available resources at some sites, as they fear that these projects will not be successful.*

The points of view expressed by the different categories of interviewee (investors, managers, public administrators, and experts) in relation to tourism resources were quite different. While public administrators considered Jordan to be rich with tourism-related resources, other interviewed stakeholders, whether investors, managers, or experts, found that Jordan has three distinguished tourism resources which are Petra, Wadi Rum, and the Dead Sea, while the other sites were not regarded as being unique or distinctive resources. Sites like Jerash and Umm Qais were seen as being similar to many sites that can be found around the world.

According to 39% of tourists, Jordan is a country that encompasses both resources and services, but 48% thought that Jordan has tourism resources but a lack of adequate services.

Moreover, 56% of public administrators describe Jordan as a comprehensive tourism product, (in terms of resources and services), compared with 29% of experts, 32% of investors, and 44% of tourism firm managers.

The percentage of those who consider Jordan to have tourism resources only, was about 23% among public administrators, 56% of investors, 32% of managers, and around 61% of experts.

It is obvious that there are quite varied opinions in relation to the nature of the Jordanian product. While categories like tourists, experts, and investors think that Jordan is rich in tourism resources but does not offer facilities and services that fit these resources, others like authorities and tourist firm managers consider Jordan to be a real tourist destination that includes both resources and services, (see Table No.15).

Table No.15: Research community's opinions on tourism resources and services

	Tourists	*Public Admin.*	*Experts*	*Investors*	*Managers*
Resources and services	*39%*	*56%*	*29%*	*32%*	*44%*
Only resources	*48%*	*23%*	*61%*	*56%*	*32%*
Only services	*11%*	*15%*	*9%*	*8%*	*19%*
Neither resources nor services	*2%*	*6%*	*1%*	*4%*	*5%*

Source: results of conducted survey

Some experts pointed out that Jordan lacks tourist services because of the late interest in the tourism sector in general. Jordan only started to actively encourage the tourism industry at the beginning of the 1990's, and it became evident that there was a gap between the actual level of services and the real needs of the tourism industry.

An expert who worked for a number of tourism bodies said:

"Tourism was not being considered an important sector for the Jordanian economy in the past, and that is why most of the tourist sites looked abandoned. Indeed, these sites had not even got basic services, like toilets, good restaurants, information points, and so on. Now, we can say that services in the tourist sites are better than before. Just look at the Dead Sea and you will notice the difference, where previously there was only one beach resort, and even that was offering only poor service to clients, now currently the Dead Sea has many restaurants and big international hotels with high quality service. Nevertheless, the Dead Sea still needs more tourism investments to satisfy more tourist categories".

However, turning now to the resources of which the Jordanian tourism product is composed, the interviewees agreed that archaeological resources are the most important component in the Jordanian product, (see Table No.16).

Table no.16: Current and potential resources

Current Resources	***Potential Resources***
• *Archaeological sites in Petra* • *Beaches in Aqaba* • *Curative spas at the Dead Sea* • *Recreational establishments in Amman*	• *Archaeological cities such as Jerash, Umm Qais, Umm Aljemal, Umm Rasas, and others.* • *Mountains and desert of Wadi Rum.* • *Historical castles in Al-Karak, Ajloun, and Al-Shoubak.* • *Desert castles* • *Forests located in the north of Jordan, (Barqash, Debeen, etc).* • *Heritage buildings such as those located in Amman and Salt which are built according to the traditional style.*

Source: results of conducted survey

As the table shows, tourism resources, which are exploited from the point of view of the interviewed sample, are concentrated in four Jordanian destinations which are Amman, Petra, Aqaba, and the Dead Sea, while the rest of the Jordanian archaeological and cultural sites are absent and considered to be potential resources that need to be provided with the necessary services in order to attract tourists. One of the professors who teach Tourism Management at a Jordanian university commented on the issue saying:

"We can't call Jerash a tourist destination, although the city has a lot of archaeological resources that would enable it to become a real destination. It lacks accommodation facilities, and there are not many restaurants of good quality. Moreover, there is no efficient public transport connecting Jerash with Amman and other tourist sites, and this forces individual tourists, who want to visit Jerash, to either hire a taxi or rent a tourist car to get there".

7.2. Jordanian tourism product:

Talking about the tourism product in Jordan raises many questions that try to focus on the nature of that product and whether Jordan has a tourism system or not. Such research is not easy, as was indicated earlier, due to the structure of the tourism industry which combines several sectors together.

7.2.1. Competitiveness of Jordan as a tourist destination:

The perception of the concept of a tourist destination might be different among tourists according to their cultural, social, and economic backgrounds. However, even academics and experts have different points of view about how the concept of a tourist destination can be defined. Theoretically, the tourist destination should have certain components to be able to attract tourists to the site and to build its distinctive image in the tourist markets.

Regarding Jordan, the majority (4.12/5.00) of interviewees confirmed that Jordan is a tourist destination that attracts tourists from all over the world. An expert pointed out that:

"Jordan is a tourist destination only because it has Petra, the city which is unique in the tourist markets and difficult to imitate or substitute with another product. Indeed, millions around the world really want to see Petra, so we should be grateful, here in Jordan, for Petra in attracting tourists to come to our country, without which our product can be neither competitive nor attractive".

This opinion is also confirmed by the survey results that show us the vital role that archaeological sites and natural attractions play in the tourism industry in Jordan together with the stability and security factor, (see Table No.17).

Table No. 17: Degree of tourist satisfaction with the components of the Jordanian product

	Mean	***Std. Deviation***
Archaeological sites	*8.77*	*1.330*
Environment and natural sites	*8.10*	*1.823*
Safety	*8.05*	*1.889*
Courtesy and character of local people	*7.73*	*1.789*
Food	*7.40*	*1.721*
Accommodation	*6.94*	*1.556*
Transport	*6.61*	*2.067*
Information	*6.22*	*2.681*
Recreational activities	*5.74*	*2.149*
Shopping	*5.55*	*2.310*
Price	*5.48*	*2.330*
Overall opinion	*7.29*	*1.750*

Highest rating is 10 and lowest is 1

Source: results of conducted survey

Notwithstanding the fact that Jordan has various historical and archaeological treasures, this richness is not sufficient to give the country a competitive advantage over the other products in the region which might have similar components, and this fact can be seen as providing challenges for the Jordanian product, (see Table No.18).

Table No.18: Main market competitors for the Jordanian product

Competitors in the Arabian Gulf market	*Competitors in European and American markets*
Syria	*Egypt*
Lebanon	*Israel*
Turkey	*Dubai*
Dubai	*Turkey*
Bahrain	*Tunisia*
Malaysia	*Morocco*

Source: results of conducted survey

As is shown in the table above, destinations that bring together recreational activities, shopping, sightseeing and archaeological site visiting represent the target for Arabian Gulf tourists, whereas other destinations like Egypt are in the lead of the competitors to Jordan in the European and American markets due to the rich resources and complete services that these destinations offer.

7.2.2. Evolution of Jordanian tourist sites:

The tourist sites in Jordan have varying degrees of development in relation to the global product, ie: in terms of resources and services. This situation is mainly related to three basic factors: the government's concentration on certain sites at the expense of others, according to the national development priorities, tourist flow volumes at each site, and the availability of financial resources to carry out tourism projects.

29.5% of the sample interviewed see that Amman has an effective local tourism system, ie: the city offers both tourism resources and services for its visitors. Regarding the archaeological city of Petra, 20.5% of the sample consider it to have a comprehensive tourism system, compared with 13% for Aqaba, 11.6% for the Dead Sea, 8.2% for Jerash, 6.2% for Wadi Rum, 2.1% for Umm Qais, and 2.1% for Ajloun.

The city of Petra comes first as the most desirable site to visit in Jordan, and in fact 21.8% of the sample expressed their desire to visit Petra or already had done so. In second place comes Amman with 12.6%, and then Jerash with 12.2%, (see Table No.19).

Table No.19: Most tourist sites visited or desired to visit by tourists coming to Jordan

Site	***Percentage***
Amman	*12.6%*
Jerash	*12.2%*
Petra	*21.8%*
Aqaba	*8%*
Dead Sea	*11.1%*
Wadi Rum	*9.5%*
Umm Qais	*8%*
Ajloun	*6.5%*
Madaba	*8.4%*
others	*1.9%*

Source: results of conducted survey

The importance of the archaeological and natural components of the Jordanian product are obvious, since the survey shows that the most attractive sites for tourists are Petra, Amman, Jerash, the Dead Sea and Wadi Rum. As a matter of fact, these indications are strongly related to the purpose of visit with more than 32.3% of the sample surveyed coming to Jordan see its archaeological sites, compared with 30.1% visiting Jordan to see heritage and cultural sites, as well as attending festivals and cultural events. On the other hand, beach tourism is the purpose for 11.8% of tourists compared with 16.1% of tourists who came to visit Jordanian cities, particularly Amman.

Moreover, to further explore the realm of the Jordanian product, the interviewees were asked to evaluate and to position Jordan according to a "Product Lifecycle Curve" which is composed of four basic phases, starting from an "Introduction Phase", then a "Growth Phase", a "Maturity Phase", and finally a "Decline Phase". In this system a product fits into one of two choices, either total decline and leaving the market, or taking certain steps to revitalise the product in order to start a new lifecycle.

This issue was discussed with experts, managers, public administrators, and investors to understand their points of view regarding the Jordan product position in the lifecycle curve, as it is essential to identify such a thing to be able to put different priorities, plans and strategies in order for the further development of the Jordanian product.

Most of the interviewees positioned Jordan in the "Growth Phase", since Jordan has witnessed huge investments in the tourism sector particularly in the past two decades, and there has also been the enactment of new laws and regulations designed to suit the needs of the tourism industry, (see Table No.20).

Table No.20: Position of the Jordanian product in Lifecycle phases according to the opinions of the interviewees

Product lifecycle phases	***Percentage***
Introduction Phase	*23%*
Growth Phase	*37%*
Maturity Phase	*18.7%*
Decline Phase	*14.3%*
Unable to determine	*7%*

Source: results of conducted survey

7.2.3. Quality of tourism services in Jordan:

Analysis of tourism services in Jordan and their quality might be an approach to shed light on the product performance and its ability to penetrate outside tourist markets, particularly because *services represent the second pillar in any tourism product together with the available resources, be they cultural, historical, archaeological, natural, or otherwise. A public administrator working in a tourism body commented on the tourism services:*

"Well, lately there has been considerable progress with the tourism services in Jordan in comparison with what was being offered in past, but the tourism sector still needs more whether quantitatively or qualitatively. For instance, if a tourist wants to come to Jordan individually without being involved in an all-inclusive package, he will face infinite difficulties in moving and transferring from one place to another, since Jordan lacks a regular means of transport that connects all the tourist sites".

Indeed, many of the people who were interviewed agreed that there are differences between the different tourist sites in Jordan in relation to the quality of services.

One investor said:

"Tourism services in Jordan differ from one site to another. Some cities like Amman and Aqaba are witnessing rapid and continuous growth in this field, and many tourist establishments, such as hotels, restaurants, transport services, entertainment facilities, and so on, were built in both cities, while at the other sites like Petra, Jerash, Wadi Rum and others, tourist facilities still need huge efforts to enhance them".

However, this point of view might not be shared by tourists who expressed their satisfaction regarding some services, particularly in the accommodation sector, (see Table No.21, No.22, and No.23).

Table No.21: *How would you describe Jordan now?*		
	Percentage	*Cumulative Percentage*
Much more than what I expected	*16.9%*	*16.9%*
More than what I expected	*30.8%*	*47.7%*
As I expected	*40.0%*	*87.7%*
Worse than what I expected	*10.8%*	*98.5%*
Much worse than what I expected	*1.5%*	*100.0%*
Total	*100.0%*	

Source: results of conducted survey

Table No.22: *How do you evaluate the services included in the package?*		
	Percentage	*Cumulative Percentage*
Much more than what I expected	*13.8%*	*13.8%*
More than what I expected	*15.4%*	*29.2%*
As I expected	*61.5%*	*90.8%*
Worse than what I expected	*7.7%*	*98.5%*
Much worse than what I expected	*1.5%*	*100.0%*
Total	*100.0%*	

Source: results of conducted survey

Table No.23: *How have you found the quality of the accommodation offered in Jordan?*		
	Percentage	*Cumulative Percentage*
Much more than what I expected	*15.5%*	*15.5%*
More than what I expected	*19.0%*	*34.5%*
As I expected	*53.4%*	*87.9%*
Worse than what I expected	*12.1%*	*100.0%*
Much worse than what I expected	*00%*	*100.0%*
Total	*100.0%*	

Source: results of conducted survey

Nevertheless, tourists did express some annoyance at the lack of some basic services at the archaeological sites such as toilets, information points, and road signs. Moreover, tourists were complaining about the quality of the public transport, the service in restaurants and high prices, (see Table No.24).

Table No.24: Most negative things in the Jordanian product in the opinions of tourists

Product components	***Percentage***
Transport quality	*16.8%*
Accommodation quality	*8%*
Restaurant quality	*10.6%*
Price level	*32.7%*
Lack of recreational activities and events	*7.1%*
Lack of some essential services at the archaeological sites	*24.8%*

Source: results of conducted survey

7.2.4. The impact of the transport sector on the performance of the Jordanian tourism product:

The transport industry, including air, maritime, and land transport, has a great impact on the tourism product, since it provides both international and domestic tourism with the necessary means to access the tourist sites. This also includes the cost of the transport and how it influences the competitiveness of the tourism product in the international markets.

In Jordan, the transport factor cannot be neglected when talking about the position of the national tourism product against its competitors, especially Egypt, Israel, Syria, Lebanon, and Turkey. For example, transferring from any of the European countries to Egypt by Egypt Air, or to Turkey by Turkish Airlines, costs much less than going directly to Jordan on the national carrier Royal Jordanian[1].

In other words, the price of the Jordanian tourism product presented in the international travel agencies worldwide is higher than the price offered by other competitors in the MENA area, especially Egypt and Turkey.

The high cost of air transport to Jordan explains the increase in the number of Arabian Gulf tourists who use land transport, (because they are geographically very near), in comparison with European and American tourists. Indeed, most of the Arabian Gulf tourists use their own cars when coming to Jordan to reduce the total cost of trip, especially in view of the fact that they usually have large families.

Furthermore, Jordan still needs to be more connected with other countries, particularly Europe and America, through the low-cost airlines which are able to break the monopoly of the air transport market held by Royal Jordanian, and offer transport services with fair prices which will enhance the competitiveness of the product. However, Jordan has witnessed some progress in this field by the launching of low-cost airlines such as Air Arabia, Jordan Aviation Airlines, Alexandria Airlines, Fly Dubai, and so on.

Actually, the increasing number of western tourists who choose Jordan as a destination imposes upon all the Jordanian authorities to work on a new strategy that will open up our airspace to the international low-cost airlines and encourage these companies get actively involved in the Jordanian market as real and strategic players. In addition, Jordan needs to enhance its rail

[1] Tickets prices between these countries were found out from the most popular e-booking sites on internet: EDREAMS and EXPEDIA.

transport network that connects it with neighbouring countries such as the Arabian Gulf countries, Iraq, Syria, Lebanon, and even Turkey in the north. Such a project would represent a turning point for the tourism industry in Jordan since rail transport is considered to be safe and economic in comparison with other forms of transport, (see Table No.25).

Table No.25: Means of transport used by tourists to visit Jordan

Transport Means	***Percentage***
Air Transport	*40.5%*
Land Transport	*41.9%*
Maritime Transport	*17.6%*

Source: results of conducted survey

Moving on to domestic transport, it is necessary to emphasise that Jordan has two types of local transport: the first one is the tourist transport which is oriented to satisfy tourist needs, and is usually used for organised packages, while the second is public transport which is basically used by local people, but is also available for individual tourists to use. The fares for the tourist transport are generally higher than those of the ordinary public transport, but the services are much better. In relation to this issue one tour operator commented:

"Some of the tourist transport companies profit from the high rates of incoming tourists during certain seasons by raising their fares, under the pretence that oil prices have increased so much that there has been an increase in operating costs. These changes in tourist transport fares are very troublesome for us, because we are always having to change the prices of the packages that we present to the international travel agencies and tour operators."

An investor in the city of Madaba also said:

"Of course, we face problems with the transport issue. You know in Jordan we have tourist transport and public transport, and here in Madaba, for example, we can't rely on public transport. Most of our tourists come by tourist transport, since our public transport is still not efficient, and if you come to Madaba as an individual, you will most likely face problems in travelling on to other sites such as Nebo, the Dead Sea, or Jerash by means of public transport, because there are no regular buses between these sites".

On the other hand, 66.7% of surveyed tourists expressed their satisfaction with the tourist transport in Jordan, while only 34% of tourists who had used public transport were satisfied.

Some experts pointed out that Jordan needs to have a comprehensive strategy for public transport to establish an efficient public transport network that connects regularly between the various Jordanian destinations, and which makes use of new technology to collect fares and issue tickets in order to guarantee that tourists pay the same fares as everyone else, unlike the present system whereby tourists are frequently expected to pay more than locals simply due to the fact that they are tourists.

7.2.5. Price-quality relationship in the Jordanian product:

The price-quality relationship is a vital issue that determines the capability of the Jordanian product to be a strong competitor in the international tourist markets. This relationship is complex and related to many factors, both internal and external, such as the conditions of supply and demand, the quality of the products offered in the markets, and so on.

One tourist administrator in Petra pointed out that the most serious threat to the Jordanian product is the relatively low prices of the products of the neighbouring countries, particularly Egypt, Syria, and Turkey which also offer products of a quality that is higher or similar to the Jordanian one.

On the other hand, a wide range of tourists considered the prices of Jordan's tourism product to be high compared to other products. 32.7% of the sample pointed out that high prices are one of the most negative features of the Jordanian product.

Indeed, the tourist point of view about price level is very significant due to the fact that most of the tourists who visit Jordan usually also go on trips to some of the neighbouring countries as well, so their opinions reflect their experience and perception of prices and quality of service in the region.

The manager of one of the hotels in Aqaba, analysing the reasons for the rise in prices of tourist services in Jordan, commented:

"The high prices of our tourist services are due to two specific things. On the one hand, there is a lack of coordination between the various tourism components, in that each one is looking to benefit without taking into consideration the other partners and stakeholders in the tourism product who also have the right to share in these benefits. The result of this is an accumulative increase in prices, making the final price very high and the product less competitive. While, on the other hand,

the cost of transport, and in particular air fares, is another negative factor that influences the final price of the product".

As a matter of fact, the price-quality relationship is essential to enhance the competitiveness of Jordanian product. Such a relationship should be based upon the balance between the various tourist service providers in order to distribute a fair margin of profit among them. This needs also an efficient mechanism that can be used to classify various tourist establishments, such as hotels, restaurants, means of transport, and suchlike, into specific categories according to both price and quality.

However, some of the investors and tourist establishment managers have defended their pricing policy, considering it very fair and reasonable compared with other competitors in the region. Indeed, according to 68% of investors, the prices of services are fair and are compatible with the quality that is offered to the tourists. In fact 73% of the tourist firm managers were of this opinion.

In fact one of the managers went beyond this, by considering that the prices of the Jordanian tourist services are very competitive, pointing out that some countries like Egypt have adopted a policy that offers accommodation and transport at low prices to attract tourists to their product, while at the same time raising the prices of other complementary services, so that the real prices in Egypt are not so low as many people think, but in fact are very expensive. While in Syria, prices of hotel services are lower than Jordan, but the quality of these services is very low as well. In addition, operating costs in countries like Syria and Egypt are lower than in Jordan because of cheap manpower and low oil prices.

7.3. Relationship between private and public sector in Jordan:

As has been pointed out already, the relationship between the private and public sector is very important, since the nature of that relationship is a determining factor in the performance of the tourism industry. During the 1980s, Jordan was following a conservative economic policy by making a major part of the most vital sectors be subject to direct state control, thus preventing the participation of the private sector in the strategic development process as it should be. By the 1990s, Jordan started to change its strategy by giving more space to the private sector in economic plans and strategies.

Indeed, studying the relationship between these two important components implies different aspects such as the decision making process, sharing of authority, efforts made in tourism marketing, the *participation in international tourist fairs and conferences, the relationship between the basic public tourism authorities and private tourism stakeholders, and finally, the role of the private sector in the enactment of regulations and laws that relate to tourism activities.*

7.3.1. Decision making process:

The tourism decision making process and private sector participation has been subject to a lot of discussion in the last few years. Recently, the government has become more aware of the necessity of private sector involvement in that process, since private stakeholders are the main players who will either benefit or lose according to any decision taken.

For this purpose, Jordan established the Jordan Tourism Board (JTB) whose law stipulated that a number of the JTB's members should be chosen from the tourism private sector with the aim of increasing the presence of that sector in the decision making process. To comment on this issue, an administrator at the JTB said:

"The launch of the JTB bridged the gap in the promotional efforts, and that is why the government decided to involve the private sector in the JTB. The new body worked from the beginning on building a partnership with the whole of the private sector, including input from hotels, restaurants, air carriers, and tourist transport companies, in order to enhance the degree of coordination between them".

Nevertheless, some managers from the private sector indicated that the situation did not change that much with the establishment of the JTB, since most of the important decisions that concern the tourism industry are still made directly by the Ministry of Tourism without any consultation with the private sector.

One academic professor stated:

"Well, we should mention that the relationship between the Ministry of Tourism and private stakeholders has witnessed some progress in the last few years. But we need yet further progress as the power is still very much retained with the public administrators who like to hold on to it, despite the fact that they profess their desire to build partnership with the players in the private sector".

In fact, the participation of the private sector might be more obvious when talking about Aqaba as an example, where the Special Economic Zone has been established that gives investors and businessmen absolute freedom to practise their economic activities, benefitting from a wide range *of exemptions and incentives that aim to attract them to Aqaba. Some investors emphasised that the tourism industry is seen by the authorities in the city as one of the main priorities, and that has made them more interested in the private sector and its contribution.*

"ASEZA is very interested in the private sector and makes a great deal of effort to guarantee an active presence for private players, usually inviting us to share our ideas and proposals. Nevertheless, this partnership between ASEZA and the private stakeholders needs to be properly formalised and more organised, since the private sector is more qualified to know its own needs and to determine the challenges that might impede its progress".

7.3.2. Relationship between MOTA and other public bodies and private sector:

Some of the interviewees mentioned that there is a certain degree of competition, (and even conflict in some cases), between the Ministry of Tourism (MOTA) with either other public bodies, or with the private sector. Such competition is a result of the implicit tendency of MOTA to keep holding onto power without giving any authority to other partners. In Petra one can see the evidence of that conflict or competition such as in the case of when MOTA tried to keep the authority established there associated directly to the ministry, until the government took the decision to make the Petra region an autonomous public body that reports directly back to the Council of Ministers, while the archaeological part of the region (Petra Archaeological Park Authority) remained associated to MOTA.

Aqaba also has a relatively autonomous authority which is connected directly to the Council of Ministers without being subject to MOTA or to any other ministries.

Indeed, the private sector still complains about the cooperation with MOTA being rather weak, and calls for further efforts in that respect. Moreover, some have asked MOTA to hand over the responsibility for management of the archaeological sites to the private sector, claiming that this would lead to more effective commercial exploitation of the sites for the tourism industry.

According to many initiatives launched by both private and public partners, the coordination between them is becoming a crucial factor in order to have a product that is well organised.

The interviewed sample considered that cooperation between MOTA, ASEZA, the JTB, Petra Region, Amman Municipality, and private tourism firms should focus on these key aspects:

- *to make promotional efforts by attending tourist fairs around the world and creating distinctive promotional materials that show Jordan as a unique destination that satisfies different categories of tourist*
- *to adopt the necessary strategies that will develop the Jordanian tourism product*
- *to enhance both tourist transport services and public transport*
- *to use efficient instruments to manage and control both supply and demand markets*
- *to encourage the tourism sector to make use of modern technology in their activities*
- *to apply a comprehensive system of quality control of the Jordanian tourism product*
- *to conduct training programmes for employees in the tourism sector in order that they improve their skills and qualifications*

According to the sample of interviewees, some factors might help to realise the coordination between the different parties, namely:

- *increasing the mutual confidence between the private and public sector*
- *developing a good relationship with all players without any kind of favouritism*
- *developing effective contact channels between partners*
- *supporting players who are involved in partnership in order to develop further motivation*
- *giving the private sector the space to make the decisions that concern it*
- *using various techniques to encourage those who are not involved to take part*
- *carrying out periodic revision and evaluation for the output of partnership*

Indeed, most of the sample agreed that building such partnership is important for developing the tourism industry in Jordan, although many of them pointed out that there are several obstacles faced such as:

- *some of the public authorities have not taken serious steps to share responsibility with the private sector*

- *there have been some negative behaviours that have made partners lose confidence*
- *there has been a lack of willingness on the part of some partners to share resources with other partners*
- *some partners have a tendency to guard their work secrets*
- *there is a fear of losing power on the part of some players*
- *there is some lack of sincere willingness on the part of the authorities to involve the private sector in global planning and management strategies*
- *there are problems with costs related to the overall coordination*

7.3.3. Role of various parties in the Jordanian tourism sector:

Each partner in the tourism industry has a special role which is usually given according to geographic considerations or due to the tasks that this partner undertakes.

Most of the opinions expressed were in agreement about the importance of the roles of various partners such as MOTA, ASEZA, the JTB, PRA, the private sector, academic institutions, and so on, but the opinions differed about which factors are the most important among those partners.

One owner of an oriental handicrafts shop in Jerash commented:

"Most public tourist authorities are likely to be absent in Jerash. MOTA and the JTB are seen only when there is the opening of a festival in the theatres, while the Municipality lacks a global strategic vision for development, due to its shortage of financial resources and lack of support from other public institutions".

In Petra, on the other hand, a tour guide said:

"When the Petra Region Authority was established, most of the citizens of Petra were pleased, because they were expecting to see a great change in their city regarding infrastructure projects and the attraction of new investment. Now, most of them feel frustrated because the creation of that authority in Petra has not fulfilled its main purpose, and the authority is just operating like any other municipality".

So it seems that there is a feeling that none of these stakeholders work as they should be, especially those that have the necessary resources to carry out their tasks, but the lack of both experience and strategic management vision make them fail to get the desired results, (see Table No.26).

Table No.26: Evaluation of the roles of the various parties within the tourism industry

Stakeholder	***Degree of importance***	***Performance evaluation***
MOTA	*Very Important*	*Good*
JTB	*Very Important*	*Good*
ASEZA	*Very Important*	*Good*
PRA	*Very Important*	*Sufficient*
Local authorities	*Important*	*Not sufficient*
Academic institutions	*Important*	*Sufficient*
Private sector	*Very Important*	*Very Good*

Source: results of conducted survey

7.3.4. The role of the private sector in the enactment of regulations and laws:

The enactment of laws is a very important issue where it is necessary to take to consideration the interests of all the main players in the field. Bearing this in mind, it becomes clear how difficult it is to satisfy all the relevant parties at the same time. For instance, "Tourism Law" impacts upon many categories, among these being the archaeological sites, tourists, local communities, tourist transport companies, travel agencies, hotels, restaurants, and so on.

Thus, it becomes essential to share opinions and ideas with all interested stakeholders by opening up discussion before the law is issued. This helps considerably in making regulations and laws that are better suited to the needs and development requirements of the tourism industry.

Indeed, most of the people interviewed expressed their satisfaction with the legislative reforms that have been made in Jordan, and which they feel are in harmony with the current needs of the tourism sector, (see Table No.27).

Table No.27: Laws meeting the needs of the tourism industry

Category	*Laws suit the current needs*	*Don't suit*	*Don't know*
Public administrators	*80%*	*12%*	*8%*
Investors	*48%*	*44%*	*8%*
Private sector managers	*52%*	*36%*	*12%*
Experts and academic staff	*64%*	*24%*	*12%*

Source: results of conducted survey

Nevertheless, many considered the role played by the private sector in the enactment of laws and regulations to be marginal and limited, since the proposals are usually made by the Ministry of Tourism, and then they are presented to the Parliament (House of Deputies, and Senate), whose various committees start to discuss them and put in the recommendations, before they are then discussed by all members.

The manager of a hotel by the Dead Sea commented:

"There is no clear mechanism that guarantees that we can contribute in the enactment of legislation that concerns our activities. When the government prepares a law, we come to know about it only through the newspapers. We want to feel that we are a part of that process, and not to be excluded in that way, because it our right to express our point of view about any law that might have an impact upon our activities ".

7.3.5. Promotion of the Jordanian tourism product:

Here again the relationship between the private and public sectors crops up when talking about promotional efforts made, as the effectiveness of such efforts is related more to the coordination level between the two. The establishment of the Jordan Tourism Board (JTB) as a public body with private presence is a proof that neither of the two sides can promote Jordan effectively alone without the contribution of other partners.

7.3.5.1. Main markets for the Jordanian product:

According to the research sample, the Jordanian product attracts tourists from three main markets: the Arabian Gulf Market, the European Market, and the American Market. Indeed, the countries of the Arabian Gulf come first as a market for the national tourism product, especially in the summer season, but these tourists visit mostly Amman and the sites in its vicinity.

One expert stated:

"The Arabian Gulf market is very important for Jordan, even though it is concentrated more in Amman. I think Jordan should promote Aqaba better in that market, since it is closer to the border with these countries than Amman, and also because it has a lot of recreational establishments that meet the needs of this category. But to get Aqaba in a better position in this market, the government needs to improve the road network that connects Aqaba with the Gulf countries".

The European and American markets, on the other hand, are divided into the traditional markets, which include tourists coming from Western Europe, the USA, and Canada, and potential markets which include Eastern Europe and Latin America, (see Table No.28).

Table No.28: Traditional and potential tourist markets for the Jordanian product from the point of view of the interviewees

Market	*Traditional*	*Degree of Importance*	*Potential*	*Degree of Importance*
Arabian Gulf - Leisure	X	High	X	High
Arabian Gulf - Beaches	X	Low	X	Medium
Arabian Gulf - Curative	X	Medium	X	High
Western Europe – Archaeological and Natural Sites	X	High	X	High
Western Europe - Beaches	X	Low	X	Medium
Eastern Europe - Archaeological Sites	X	Low	X	High
Eastern Europe - Beaches	X	Low	X	High
America - Archaeological and Natural Sites	X	High	X	High
Asian Tourists - Archaeological and Natural Sites	X	Medium	X	High

Source: results of conducted survey

7.3.5.2. Role of the private sector in the promotion of tourism:

The importance of tourism marketing in Jordan had been quite neglected up until the 1990's when the government decided to establish the Jordan Tourism Board (JTB) to undertake promotional projects and campaigns worldwide. Nevertheless, this important sector still faces several difficulties such as the following:

- *a shortage of financial resources dedicated to tourism marketing whether these be from the public sector or from private institutions*
- *a lack of qualified manpower in the field of tourism promotion*
- *a failure of the local mass media to promote Jordanian destinations abroad*
- *an inability on the part of Jordanian tourist websites to reach consumers and internet users worldwide, because of the poor content of these sites, lack of facility for online booking of*

some services, and the lack of the facility for self package building without resort to tour operators

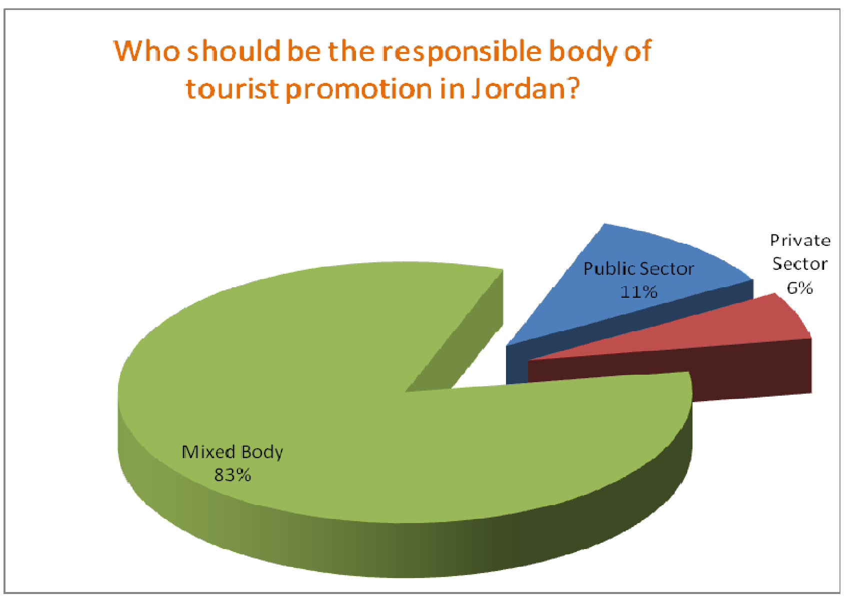
- *difficulties derived from the lack of coordination between the JTB and other public bodies working in the tourist destinations such as ASEZA, PRA, and so on.*

Moreover, some parties from the private sector complain about the existence of favouritism regarding participation in the international tourist fairs. In relation to this, one tour operator said:

"They don't help us to promote our products at the international fairs, and we feel sometimes unable to take part in these events due to the lack of support".

All the interviewees confirmed the necessity of coordination between the different bodies in the tourism marketing of the product, and the involvement of various players together, (see Figure No.7).

Figure No.7:



Source: results of conducted survey

Such coordination can start by networking between the different components of the tourism sector under the aegis of the JTB in a manner that increases the presence of the private sector in a manner *that might be described as both horizontal (several tourist activities), and vertical (firms with various dimensions).*

7.3.5.3. Financing of promotional projects:

The shortage of financial resources dedicated to promotional projects represents the main problem that the sector faces. Obviously, some steps in this field, such as attendance of international fairs, holding conferences, hosting international mass media, and publicising the Jordanian product need huge financial resources that the JTB's budget cannot afford, (see Table No.29).

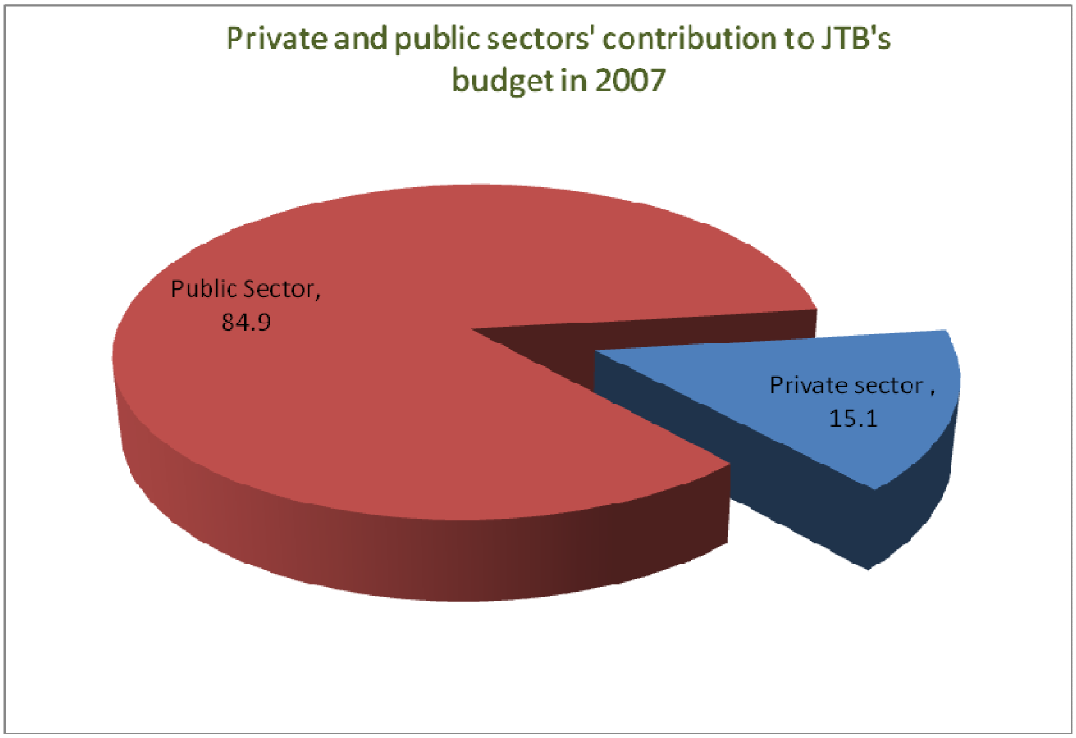
Table No.29: The Budget of Jordan Tourism Board for years 1998-2007

Year	*Public contribution (Jordanian Dinar)*	*Private sector contribution (JD)*	*Total (JD)*
1998	*1,000,000*	*399,100*	*1,399,100*
1999	*2,700,000*	*1,095,369*	*3,795,369*
2000	*4,000,000*	*873,689*	*4,873,689*
2001	*3,837,500*	*739,942*	*4,577,442*
2002	*5,000,000*	*590,271*	*5,590,271*
2003	*5,250,000*	*881,311*	*6,131,311*
2004	*7,000,000*	*880,168*	*7,880,168*
2005	*9,000,000*	*1,456,569*	*10,456,569*
2006	*6,000,000*	*1,800,000*	*7,800,000*
2007	*9,750,000*	*1,730,000*	*11,480,000*

Source: Jordan Tourism Board, 2008

In the regulations of the JTB, the mechanisms of financing that can be used to fund promotional projects were specified, and the amounts that each part (government, hotels, restaurants, transport companies, Royal Jordanian, and so on), should contribute. Nevertheless, the government is still the first contributor to the JTB's budget, and also the main supporter of its activities. The *contribution of the private sector in promotional programmes is not enough according to 69.2% of public administrators, and 53% of experts. While 59% of investors and 60.9% of managers of private firms consider the contribution of the private sector to be satisfactory, (see Figure No.8).*

Figure No.8:



Source: Jordan Tourism Board, 2008

Besides the direct financing channels, some of the people interviewed pointed out the importance of finding other resources, like taking part of the entrance fees to the archaeological sites to finance projects of promotion or cultural activities and festivals, as a way of increasing resources.

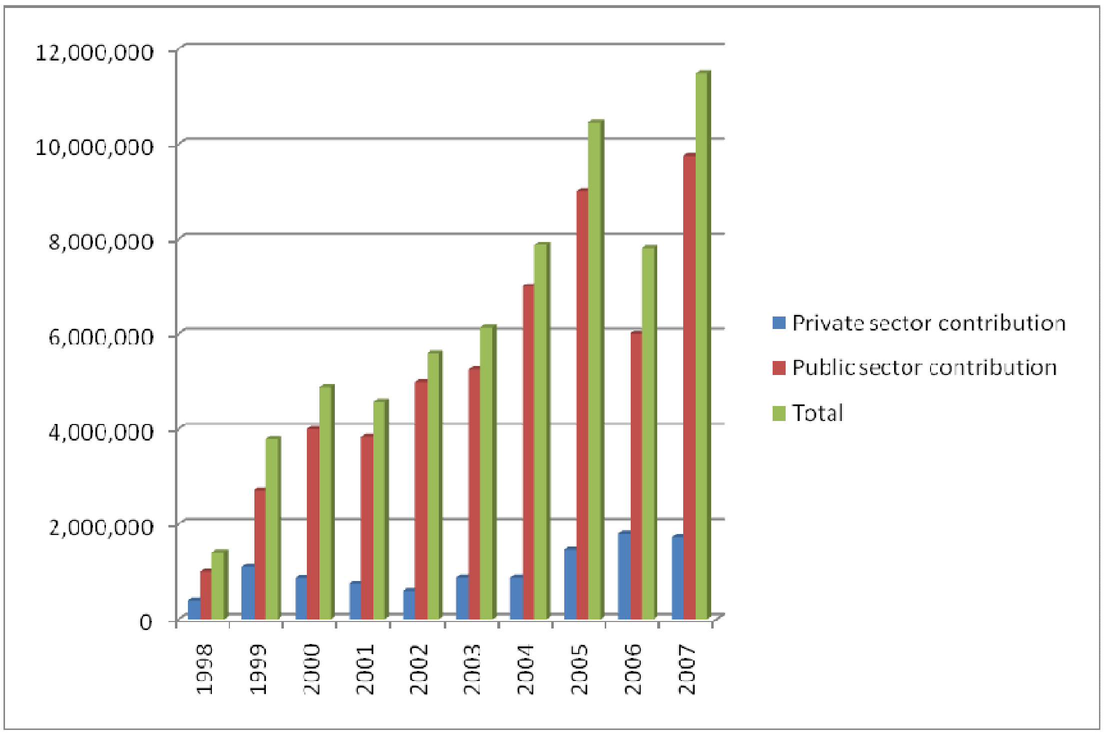
The manager of a travel agency in Amman highlighted the significant role that movies and TV programmes can play, saying:

"TV programmes and movies have a considerable impact on their spectators, and they are very useful in the promotion of Jordan as an interesting destination. Just see how movies like "Lawrence of Arabia" and "Indiana Jones and the Last Crusade" influenced people and made them think of visiting Petra and Wadi Rum, and look also at some Turkish TV series like "Noor" and "Sanwat Aldaya'a" interpreted into Arabic and transmitted on the Arabic channels, and their incredible impact on the tourism industry in Turkey during the summer of 2008. Thus, Jordan has to attract

the movie makers to film on location in the Jordanian destinations such as Petra, Wadi Rum, Ajloun, and other places."

Despite the fact that only a small budget was dedicated to the promotion of tourism compared with that of the neighbouring countries, (such as Egypt, Israel, and Turkey), Jordan has nevertheless witnessed a rapid and continuous growth in that budget during the last few years, (see Figure No.9).

Figure No.9: Growth of promotional budget



Source: Jordan Tourism Board, 2008

7.4. Statistical system and tourist database in Jordan:

Having an efficient statistical system is fundamental to knowing the needs of tourists and to analysing their economic, demographic, and social characteristics. In this sense, statistics lead the way to building the product in harmony with tourists' expectations and purposes, and according to the feedback formed from research and studies conducted in the field. However, statistics should be compiled periodically to cover various seasons, and at all the tourist sites, in order to make the data gathered more comprehensive.

7.4.1. Availability of statistics related to tourism:

There are many governmental resources that can be looked at to get information about the tourism sector in Jordan, and each of them tries to cover specific aspects of that industry. Some examine the number of arrivals, nationalities, tourist establishments and their categories, while others deal with the economic dimension of tourism and its impact on Jordan.

The main resources for tourism information in Jordan are:

- *the Ministry of Tourism and Antiquities (MOTA)*
- *the Jordan Tourism Board*
- *the Department of Statistics*
- *data from land borders, airports and ports*
- *data from the Central Bank*
- *statistics compiled by the Department of Tourism in Aqaba, (ASEZA)*
- *the Ministry of Industry and Trade*

Most of these parties publish their statistics on their websites so that academics and various decision makers can use them.

An administrator at the Ministry of Tourism said:

"MOTA has compiled various statistics related to the tourism industry in Jordan, and it works hard always to ameliorate the quality of this information by resorting to several reliable sources in order to augment the credibility of the data".

MOTA publishes statistical reports every three months including various types of information about tourism activity in that period, and makes comparisons with the same quarters in previous years in order to measure the performance of the tourism sector.

7.4.2. Efficiency of the tourism statistical system:

Tourism statistics in Jordan are still unable to give an accurate and comprehensive idea about the tourism sector, although great efforts have been made by the Department of Statistics (Ministry of

Tourism), to gather and analyse data. The Ministry depends on the counting of entrance tickets for the archaeological sites like Petra, Jerash, and Ajloun, and the entry tickets bought for the archaeological museums such as those in Aqaba and Amman. The number of arrivals and nights in hotels is also an important indicator on which Jordanian statistics rely. Nevertheless, these resources are not enough to give a complete image. For example, not all tourists who go to Aqaba visit its museums, and some tourists do not sleep in hotels as they use suites and furnished apartments which are usually not included in the statistics.

Furthermore, the Ministry of Tourism also resorts to the data processed by the border authorities on passengers and their nationalities. This might be accurate in some cases, but not in others, for example, many Egyptians, Bengalis, and Filipinos arrive in Jordan as tourists but then start to look for work in Jordan.

Indeed, other public authorities, such as the Department of Statistics, Central Bank, and JTB, use the same sources of data to analyse the impact of tourism on the national economy. On the other hand, the Central Bank explores the economic impact of tourism by studying specific aspects of it, such as foreign exchange earnings, the balance of payments, and the contribution of tourism to the reduction of unemployment and poverty rates.

Thus, it becomes clear from the above that Jordan lacks a specialised statistical system that can use one mechanism for gathering data from various sources relevant to the tourism industry, ie: hotels, restaurants, transport companies, airlines, and so on.

In fact 56.5% of the research community considered the statistics system in Jordan to be inefficient. Experts, specifically, underlined the necessity for new methods to measure the tourism sector's performance, like those used in research conducted by foreign agencies such as USAID and JICA.

The interviewees identified the main problems in the Jordanian tourist statistical system as being:

- *The fact that there is no specialised research institute for tourist statistical studies that can take the responsibility of analysis for the Jordanian tourism industry.*
- *The need for one database that can bring together all tourist activity data, covering accommodation facilities, restaurants, transport, and so on.*
- *The lack of periodical studies (yearly, quarterly, monthly, and so on), conducted on tourists in all Jordanian destinations.*

- *Weak coordination between relevant parties.*
- *Shortage of financial resources dedicated to collecting and analysing data.*

7.5. Prospects for the Jordanian tourism product by 2020:

At the beginning of this century, many countries, especially in the Third World, prepared their visions for economic stimulus plans and development strategies. Jordan also opened up discussions on the prospects for tourism by 2020 and the challenges that the industry faces in achieving its goals. This included issues such as the competitiveness of the Jordanian product, the mechanisms needed to ameliorate the product, and the human resources, as well as the strategies that should be used to make sure they are trained and armed with the necessary skills.

Private stakeholders were also present and active in these discussions since they are very important players in that field.

7.5.1. How the tourism product should be:

In the study, most of the people expressed their dissatisfaction with the Jordanian product's performance, emphasising that the tourism industry in Jordan suffers weaknesses in some aspects, and hence, according to those people, it is necessary to start dealing with these issues by using a comprehensive process of requalification for the product's components in order to be in harmony with tourist needs and the realm of the Jordan tourist sites.

The future tourism product should be built in three main phases:

First phase: Product Development:

In this phase, tourism resources get identified and classified according to their degree of importance and to what extent this or that site can be used immediately to attract tourists. Then, national campaigns should be conducted to restore these sites if damaged, and to preserve them from negative behaviours if they are threatened by these.

After having identified the main tourist resources, a holistic evaluation should be carried out to check for existent tourist services and whether they meet the real needs of tourists. Here, the experts urged that the private sector be given a primary role in the development projects, and even in infrastructure projects which have traditionally been the preserve of the public sector. Such *involvement has been met with success in most of the projects operated on the BOT system (Buy-Operate-Transfer).*

Investors emphasised the crucial role that their investments play in the tourism industry whether this be by constructing infrastructure or enhancing tourist facilities. However, they considered the effectiveness of that role to be conditioned by the nature of the relationship with the public sector.

On the other hand, a university professor mentioned that the tourism product building process should take into consideration the question of the quality-price relationship, and the ideal methods by which to classify tourist establishments according international standards, and the setting of a pricing mechanism that will make the product competitive.

According to the sales manager of one Aqaba's hotels, expensive air tickets are still the main obstacle that impedes the growth of incoming tourism to Jordan, especially due to the fact that these prices are much higher than those offered by other destinations such as Syria and Egypt.

Second Phase: Promotion:

Completing the product building process is not a prerequisite for the starting of the promotional campaigns, as they can both be carried out concurrently, ie: both attracting more tourists to come, and continuing development projects at the same time. It is the continual innovations in the tourist package components that keep people coming back to visit the same place again and again, as can be seen with tourism to Dubai, where new ideas are always being launched that make tourists want to go there.

From the survey it emerged that the majority of tourist sector leaders agree that promotional campaigns should combine Petra, (which is the most important component in the Jordanian product), with other tourist sites in order to attract several categories of tourist to each tourist itinerary, especially in view of the fact that Jordan still faces the problem of classifying its tourist sites into either archaeological destinations, (which most of them are), recreational tourism destinations like Aqaba and Amman, or beach tourism destinations, such as Aqaba and the Dead Sea, (see Table No.30).

Table No. 30: Current and future categories of tourist according to the opinions of the interviewees

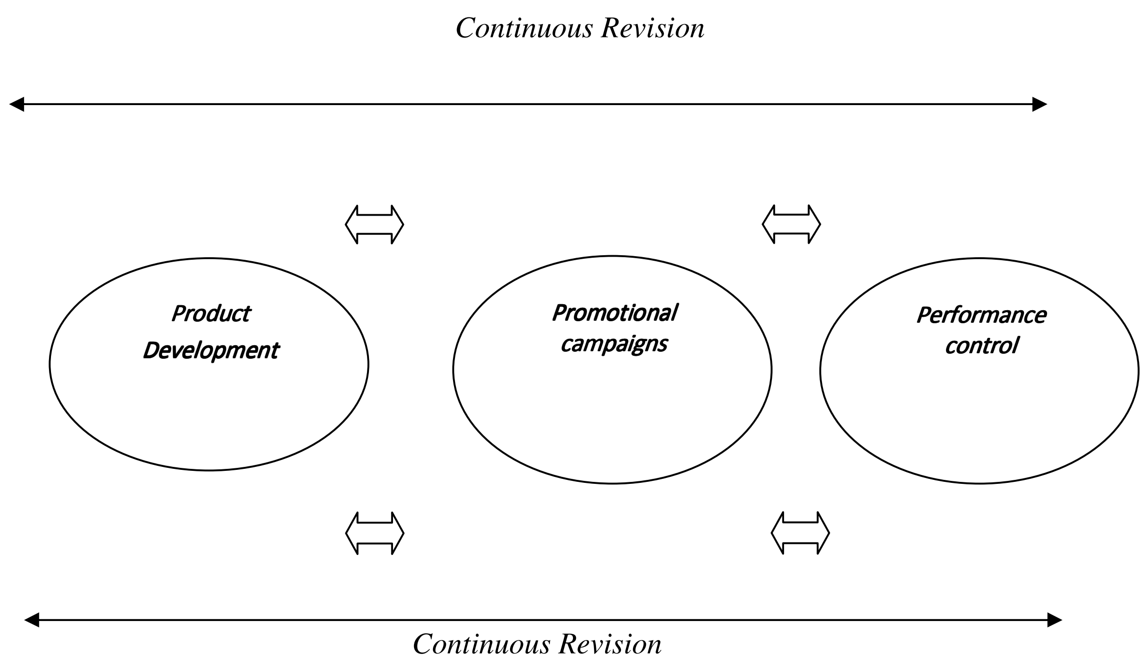
Destination	***Current segments***	***Potential segments***
Amman	*Conferences + Summer Holidays*	*Archaeological + Recreational + Summer Holidays + Conferences*
Jerash	*Archaeological + Festivals*	*Archaeological + Festivals + Natural*
Petra	*Archaeological*	*Archaeological + Natural + Festivals*
Dead Sea	*Beach + Curative + Conferences*	*Beach + Natural + Curative + Conferences*
Madaba	*Religious + Archaeological*	*Religious + Archaeological + Curative*
Aqaba	*Beach + Shopping*	*Beach + Shopping + Recreational*
Wadi Rum	*Natural + Camping*	*Natural + Camping + Hiking*

Source: results of conducted survey

Third Phase: Performance quality and control:

During this phase, all development projects and promotional programmes should be subject to synchronous control with the aim of measuring the efficiency of these efforts on tourist demand rates, and making decisions that help to avoid the emergence of defects or weak points.

*Figure No. 10: Phases of Tourist Image Building**



**Author's design*

7.5.2. Future relationship with the tourism products of neighbouring countries:

Experts in the Jordanian tourism industry felt that the relationship with the neighbouring countries in terms of tourism should progress in two directions: firstly, Jordan could achieve a competitive edge against the products of these destinations by improving the quality of the product itself, and by the improvement of promotional programmes to show Jordan as an attractive and brilliant destination in comparison with Egypt, Israel, Syria, Lebanon, and Turkey; but secondly, the relationship with the neighbouring countries has to be based upon cooperation at the same time, in order to strengthen the positive image of the whole of the Middle East area as interesting destination. Thus, partnership becomes useful in attracting European and American tourists, while a high degree of coordination with Syria and Lebanon might be necessary to increase the number of arrivals from the Arabian Gulf countries.

According to public administrators, establishing partnerships with neighbouring destinations need not threaten the Jordanian product in either the medium or the long term, but it might do so in the short term due to some weak points from which the national product suffers. They believe that the Middle East area ought to be promoted as one product in order to enhance its competitiveness in the international markets.

On the other hand, businessmen in the tourism sector underlined that any coordination project will not achieve success without stability and security in the region, because it is impossible to create joint tourist packages that include Jordan, Israel, Syria, and Lebanon without peace agreements being reached.

However, the interviewees explained that the main advantage of joint packages is the creation of one tourism product, especially for overseas tourists who travel very long distances, (for example Americans, Australians, and others), and who generally prefer to visit more than one destination in the same region.

7.5.3. Strategies needed for the development of the tourism sector in Jordan:

Most people interviewed urged public authorities to adopt the necessary strategies and plans that will contribute to enhancing the tourism product according to national priorities, (see Table No.31).

As a matter of fact, the relationship between the private and public sectors represented the core of the economic development strategies for many of the people interviewed. They considered the private sector to be the engine of future development, and hence pointed out the necessity of involving it in the decision making process, since it has a greater ability to understand the needs and expectations of tourists.

Table No.31: Priorities and time schedule for implementation

Priority	***Short Term***	***Medium Term***	***Long Term***
Identifying tourism strategies	*X*		
Setting an action plan	*X*		
Conducting projects at the main sites			*X*
Building partnership between private and public sector		*X*	
Involving local community			*X*
Enhancing transport sector			*X*
Training staff		*X*	
Conducting promotional campaigns		*X*	
Revision and control of strategy and policy	*X*	*X*	*X*

Source: results of conducted survey

Besides that, the people interviewed agreed on the importance of developing new promotional instruments with the aim of reaching the various tourist segments worldwide, (see Table No.32).

Table No.32: Main components of tourism marketing and promotional strategies

Component	***Already existing***	***To be realised***
Networking between various partners		*X*
Launching mixed promotional body (public + private)	*X*	
Making an outstanding brand for Jordanian product		*X*
Designing professional websites for promotion		*X*
Brochures and booklets	*X*	
Organizing festivals and recreational events at various tourist sites		*X*
Conducting periodic studies and surveys on incoming tourism		*X*

Source: results of conducted survey

Chapter Eight

Conclusion

Tourism sector in Jordan has grown up significantly in the last two decades and become a driven force for the economic prosperity in the country. Before that, tourism was not a priority for the government because of the lack of stability in the Middle East region and the political crises emerged during the era before the signing of peace treaty with Israelis.

Besides, there was a lack in the research efforts oriented toward the tourism industry in Jordan, posing several obstacles to the development process in this sector. Some international agencies like USAID and JICA have been among the first to conduct serious studies on the tourism in Jordan. Other studies were conducted by some Jordanian and non-Jordanian researchers in several areas of interest.

It is very important to have a comprehensive profile of all Jordanian tourist destinations in which all components are categorised and identified in order to have a clear vision of the Jordanian product which we can then use to tailor an overall strategy. Such a profile should not focus only on the archaeological descriptive method used in the past to present the Jordanian product, but also has to categorise the destination resources whether natural or man made, and classify tourism services at each destination.

Based on what said so far, this study has shed some light on the three important aspects of Jordanian tourism product which are; resources, services and governance, and tried to develop a clear concept of the Jordanian tourism product and its components analysing various elements that influence the evolution of a destination, in order to understand the role played by both resources and services in attracting tourists.

Actually, five Jordanian tourist sites were chosen to be a study field. The selection of these five destinations was based on various criteria in order to cover the whole Jordan geographically, to study various tourism segments, and to analyse different categories of tourists.

The study attempted to give a holistic overview of tourism in Middle East region, then moved to explore the tourism industry in Jordan by presenting its tourist supply and demand, contribution of tourism to the national GDP, investment in the Jordanian tourism sector, the added value of tourism, foreign exchange earnings, Jordan strategies to develop tourism sector, different plans adopted by various stakeholders to enhance their activities. In addition, the study discussed the public policies and laws, various legislations concerning the conservation of cultural heritage and *the protection of natural and environmental resources, the division of responsibilities for tourist affairs between the different public authorities (such as; MOTA, JTB, ASEZA, PRA, PAP, JVA, BSB, and so on), the relationship between various tourist bodies, and the incentives and privileges offered to attract investment to the tourism sector.*

Finally, the study solicited other issues such as the competitiveness of the Jordanian product, quality of tourism services in Jordan, price-quality relationship, the impact of transport sector on the performance of the tourism sector, decision making process, relationship between MOTA and other public bodies and private sector, role of private sector in enactment of laws and regulations, role of private sector in the promotion for Jordan, and statistical system and tourist database in Jordan.

Among the main findings:

First, regarding the tourism resources in Jordan, it has been found that although Jordan has miscellaneous tourism resources (ie. cultural, archaeological, natural), which are spread over the country, the archaeological resources, however, represent the main component in the Jordan product because of the variety of civilizations that settled in Jordan during the past centuries; not all of these resources are taken into consideration and some of them seem to be abandoned. Furthermore, some of resources are manipulated spontaneously without having a clear vision of the form these resources should be on. In addition, there are no adequate tourism services in the tourist destinations that meet visitors' needs.

Second, in regard with the global master plans for tourist destinations, the comprehensive strategies were set up for few tourist cities like Amman and Aqaba to enhance the tourism product development process over there, while in the others are lacking such strategies nevertheless the importance of these sites in the tourism national product.

Third, in the light of examination of the competitiveness degree of Jordan tourism product, it can be quite clear the weight of archaeological sites in the national product, those archaeological sites still one of the strongest drives for tourists to visit Jordan. Security and stability has also a determinant role in positioning the Jordanian product.

Fourth, some factors like the government's concentration on certain sites, tourist flow volumes at each site, and the financial resources; were always significant when it comes to explore the degree of evolution in each tourist site in Jordan. Amman, the Capital City, is one of the most effective *developed local tourism systems in the country although other cities, like Petra, are more desirable by tourists.*

Fifth, according to the interviewed people, Jordan is witnessing a considerable growth in its tourism product, and this makes it be positioned in the "Growth Phase" of Lifecycle Curve. The main indicators for such position are the huge investments in the tourism industry and the new laws and regulations enacted to suit tourism sector needs.

Sixth, exploring the quality of services offered in Jordan shows that although the distinct and unquestionable progress in the services quality in the last two decades, there is still a lack of some basic services that tourists usually need. Public transport, for example, is one of the most common problems that face individual tourists particularly. Other tourists complain about services quality in the archaeological sites.

Seventh, with regard to prices of services in Jordan, the transport costs influence on the final prices of tourist packages. The air transport in Jordan has negative consequences on the competitiveness of the national product against the other products offered by the neighbouring markets. Actually, the low prices of products of the neighbouring countries is a serious threat to the Jordanian product, especially that they offer products of a quality which higher or similar to the Jordanian one.

Eighth, the relationship between private and public sector is an important factor in the performance of tourism industry where the establishment of JTB was one of its outcomes. Jordan had realized the need to involve private sector in the decision making process, so it conducted many strategies to increase the participation of private sector in the whole process. Nevertheless, many of private sector players think that the main decisions are still made directly by the Ministry of Tourism without any consultation with the private sector. Moreover, there are also difficulties related to the communication and coordination between public bodies themselves, hindering the building of global strategy for the country as a whole.

Ninth, the role of private sector was also considered marginal and limited in the enactment of laws and regulations that concern tourism industry. The most important player in this field is the Ministry of Tourism that normally prepares and presents them to the parliament.

Tenth, promotional efforts also show the gap between the private and public sector. The contribution of the private sector is still very limited and the great share of costs is covered by the *government. Private sector complains of its weak presence in the international campaigns worldwide, and the absence of real support from the public side.*

Eleventh, concerning the attitudes of local communities towards the tourist sites, it has been found that there is carelessness from local community side, resulting in different forms of negative behaviours that threaten and put at risk the existence of cultural and archaeological sites. Moreover, the efforts made to involve residents in the vicinity of tourist destinations in the tourism process still insufficient, and most of local people find themselves apart from the decision making process and its mechanisms.

Twelfth, concerning the tourism statistical system in Jordan, there is a shortage in the accurate information and figures about the tourism industry in Jordan, and the current methods in use are unable to provide decision makers by the necessary inputs that serve to adopt the appropriate strategies. Moreover, there is lack in the statistical data regarding the domestic tourism in Jordan and its various forms.

Recommendations:

Based on the findings of the study, it is very evident the need to restructure the national system in Jordan in order to be more competitive in the international markets. Although Jordan has defined its own vision for tourism sector, this sector still lacks a global strategy that gathers all relevant stakeholders together. This strategy should try to reunify the public bodies in charge of tourism affairs so that they can react in a harmonic way without any emerging conflicts between them. Actually, enhancing the coordination between various public bodies represents a priority to get success in any global strategy for tourism once adopted.

The relationship between public sector and private sector has to be reviewed in the way that gives the private sector the importance that it deserves whether in setting up the necessary strategies and plans that concern their activities, contributing to the enactment of laws and regulations associated with the tourism industry, or by involving it in the various efforts made for supporting the share of tourism in the national economy. Such efforts can include the participation in the promotion of national product worldwide, giving the private sector the opportunity to partake in the management of tourist destinations, and consulting with private sector before taking the decisions that concern the tourism industry.

Since the tourism resources are the basis of Jordan tourism product, they need a serious reappraisal to the steps taken so far to make these resources accessible and suitable for tourism industry needs. Categorising the tourism resources and classifying the tourism services provided in these sites are fundamental for being able to understand more about the existed resources that can improved and the potential resources that can be exploited. After the process of categorisation and classification of resources it becomes easier to shape the product in a way that meets the tourist demand. Moreover, it is of a great importance the reconnection between tourism resources in Jordan so that well-built local tourism products can be launched and promoted.

Prices of Jordan tourism packages are still one of the obstacles that hamper the penetration of the national product into the international markets, especially with very competitive prices that the neighbouring countries offer. The air transport prices influence the cost of the whole package sold to the customers and make the final price more expensive and less competitive to the rival products. Thus, encouraging the low-cost companies to get into the Jordanian markets would be appealing to the needs of the tourism industry, and will strongly be effective in breaking the barriers that face the tourist flow towards Jordan.

In addition, tourism sector in Jordan is in need for the inclusion of local communities who are an important partner in the tourism system and without whom any strategy for tourism destination development will fail to tackle with the real priorities in each tourist site. Local community has to take part in the destination management in order to interact effectively with authorities and their decisions on the ground.

Finally, government have to build a statistical system specialised in tourism sector in order to analyse the evolution of the tourism industry in Jordan by using the appropriate tools that can give accurate data about the real situation of tourism in the country. Such a system will give a clear idea about the tourists who come to Jordan, their needs, expectations, and their economic, religious, social and cultural backgrounds. Moreover, it will be responsible of filtering out visitors for tourism purpose from those who come to other drives.

	List of Abbreviations
AMIR	*Access to Microfinance and Improved Implementation of Policy Reform.*
ASEZA	*Aqaba Special Economic Zone Authority*
BSB	*Baptism Site Board*
FTA	*Free Trade Agreement*
GAFTA	*The Greater Arab Free Trade Agreement*
GDP	*Gross Domestic Product*
GIS	*Geographical Information System*
GTZ	*German Technical Cooperation Society*
JICA	*Japan International Cooperation Agency*
JTB	*Jordan Tourism Board*
JVA	*Jordan Valley Authority*
LTS	*Local Tourism System*
MENA	*Middle East and North Africa*
MOTA	*Ministry of Tourism and Antiquities*
NGO	*Non-Governmental Organization*
PAP	*Petra Archaeological Park*
PRA	*Petra Region Authority*
QAIA	*Queen Alia International Airport*
QIZ	*Qualifying Industrial Zones*
RBT	*Resource-based Theory*
RJ	*Royal Jordanian Airlines*
UNDP	*United Nation Development Program*
USAID	*United States Agency for International Development*
WTO	*World Tourism Organization*
WTTC	*World Travel and Tourism Council*

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Appendices

Appendix A: __Examples for the questions in the interviews with stakeholders__

Category to which you belong:

- ☐ *Investor*
- ☐ *Expert and scientific institute member*
- ☐ *Public administrator*
- ☐ *Manager of tourist firm*

1- *I can consider Jordan as a tourist destination :*

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

2- *I see the Jordanian product very attractive:*

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

3- *Jordanian tourist transport sector is efficient :*

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

4- *Jordanian public transport is efficient:*

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

5- *Services quality is adequate:*

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

6- *Services prices are adequate:*

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

7- Services prices in respect to the quality offered are adequate (quality-price is faire):

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

8- Jordanian packages price are competitive in comparison with other neighboring countries packages:

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

9- Tourist Information points in the touristic sites are adequate:

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

10- I am satisfied of accommodations level in Jordan:

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

11- Jordan is safe tourist destination:

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

12- How much satisfied are you about accommodations quality offered to tourists in Jordan?

Very satisfied	Satisfied	neutral	dissatisfied	very dissatisfied
☐	☐	☐	☐	☐

13- How much satisfied are you about transport services quality in Jordan?

Very satisfied	Satisfied	neutral	dissatisfied	very dissatisfied
☐	☐	☐	☐	☐

14- Are you satisfied in the presence of private sector in the international expositions:

Very satisfied	Satisfied	neutral	dissatisfied	very dissatisfied
☐	☐	☐	☐	☐

15- *I think that incentives to attract investors to Jordan are satisfied:*

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

16- *Rules and regulations are compatible with investors perspectives:*

I strongly Agree	I agree	am not sure	I disagree	I strongly disagree
☐	☐	☐	☐	☐

17- *Is the Jordanian tourism sector attractive for the national and foreign investors?*

Yes ☐ *No* ☐

18- *How are accommodations being booked by tourists?*

- ☐ *In advanced, directly with the accommodation*
- ☐ *In advanced, directly through travel agent or T.O*
- ☐ *Upon arrival at the accommodation*
- ☐ *Though internet*
- ☐ *In another way, i.e. ……………………………*

19- *How long prior to the trip tourists make the reservation?*

- ☐ *Less than 1 month ago*
- ☐ *Between 1 and 3 months ago*
- ☐ *Longer than 3 months ago*

20- *Do you see Jordan as:*

- ☐ *Tourist Resources and Services*
- ☐ *Only Resources*
- ☐ *Only Services*
- ☐ *Neither resources nor services*

21- Supposing that Jordan is a tourist destination, in which phase of cycle life curve it can be viewed ?

- ☐ *introduction phase,*
- ☐ *growth phase,*
- ☐ *maturity phase,*
- ☐ *decline phase*
- ☐ *I can't determine in which phase*

22- Which of following sites has an effective local tourism system (resources and services):

☐ *Amman* ☐ *Jerash* ☐ *Petra* ☐ *Aqaba* ☐ *Dead Sea*

☐ *Wadi Rum* ☐ *Umm Qais* ☐ *Ajloun* ☐ *Madaba* ☐ *Other………*

23- What is the main purpose of tourists coming to Jordan?

- ☐ *Leisure, recreation and holidays*
- ☐ *Visiting friends and relatives*
- ☐ *Business and professional (not including congresses)*
- ☐ *Congress*
- ☐ *Study or school trip*
- ☐ *Stop over on the way to another country*
- ☐ *Religion/pilgrimages*
- ☐ *Sportive activities*
- ☐ *Other reasons*

24- How do you characterize the motive of tourists to pass their holidays in Jordan?

- ☐ *City trip*
- ☐ *Beach holiday*
- ☐ *Holiday in the countryside*
- ☐ *Cultural sites*
- ☐ *Archeological sites*

25- Which of following activities are usually attracting tourists in Jordan? (you can answer more than one)

- ☐ *Shopping*
- ☐ *Visiting museums*
- ☐ *Visiting academic institutes and libraries*
- ☐ *Attending cultural festivals visiting old parts of cities and small villages*
- ☐ *Taking a trip by care*
- ☐ *Diving in Aqaba Gulf*
- ☐ *Camping in Wadi Rum*
- ☐ *Visiting natural reserves*
- ☐ *Attending sportive events*
- ☐ *Eating a typical Jordanian foods in traditional restaurant*

26- What are the most appreciated things in Jordanian product? (you can choose only two)

- ☐ *Archeological sites visited*
- ☐ *History of Jordan*
- ☐ *Modern cities*
- ☐ *Friendly people*
- ☐ *Security*
- ☐ *Fair weather*
- ☐ *Cultural events and festivals*
- ☐ *Restaurants and accommodation*
- ☐ *Natural sites*
- ☐ *services quality*

27- what are the weakness points in the Jordanian product? (choose max two)

- ☐ *Transport quality*
- ☐ *Accommodation quality*
- ☐ *Restaurants quality*
- ☐ *Price level*
- ☐ *Lack of recreational activities and events*
- ☐ *Lack of some essential services in the archeological site; i.e. …. Toilets*

28- Score your satisfaction level of the following components of Jordanian product?

Aspect	***Scores from 1-10*** *10= max satisfaction,* *1 =minimum satisfaction*
Archaeological sites	
Environment and natural sites	
Accommodation	
Food	
Transport	
Price	
Shopping	
Information	
Safety	
Courtesy and local people character	
Recreational activities	
Overall opinion	

*Average scores to be assigned by tourists in Jordan **8.61***

First part: Introduction:

29- Do you consider Jordan a mature tourist destination? And why?

………

………

30- Which are the most important contents of any Jordanian travel package?

………

………

31- What are obstacles that impede Jordanian development plan for tourism sector?

………

………

32- *Do you think that Jordanian government is matching well to attract investors to this sector?*

………

………

33- *In which Jordanian tourist sites you are matching your activities? Why?*

………

………

34- *Which are the market for Jordanian product and which of them can be considered as a potential market for national product?*

Market	*Current*	*Target*	*Potential*	*Target*

Target: High, Medium , low

35- *Do you think that Mediterranean products can be seen as threat for Jordan as a destination?*

………

………

36- *Should Jordanian product promoted alone or with neighbored countries like Egypt, Syria and Lebanon ?*

………

……

37- *Which are the main competitors to the Jordan product?*

On the regional level (Middle East)		*On the international level*	
Current	*Potential*	*Current*	*Potential*

38- What are the main current tourism strategic resources in Jordan which are capable to attract tourist demand?

Current resources

39- What are the potential resources that can be attractive and which is not exploited yet?

Potential resources

40- What is the local community attitude of the role played by governmental and administrative bodies:

Governmental body	*Institutional role**	*Opinion on matched activities***
Ministry of Tourism		
Jordan Tourism Board		
ASEZA (Aqaba)		
Petra Region Authority		
Local Authorities		
Universities and academic institutes		
Private sector		

** Indicate: (very important); IM (important); (not very important); (not important)*

***Indicate : (v. good); (good); (sufficient); (not sufficient)*

41- What are the most important obstacles that impede development plans in tourist destination?

- lack of some of product components like; Hotels, Restaurants, transport services, information points others (specify it ……………………………………………………………………………………….) ( )
-competitiveness of other destinations (specify them …………………………………………………) ( )
- the individualism in decision making taken by mangers or firms holders, because of the lack of managerial culture ( )
-lack of coordination between various stakeholders ( )
-having tourism bodies and local societies that are unable to valuate cultural and artistic heritage ( )
-absence of tourism strategic politics on the local level ( )
-need to focus on specific segments of market ( )
- lack of strategies of marketing and promotion ( )
- lack of coordination between the stakeholders present in research area ( )
- problems of accessibility in regard with non realized initiatives in the area ( )
- lack of specialists in tourism sector ( )
- other; (specify: ____) ( )

42- What are the necessary interventions that you think should be undertaken to improve the tourism sector in Jordan?

- ……………………………………………………………………………………………………
- ……………………………………………………………………………………………………
- ……………………………………………………………………………………………………
- ……………………………………………………………………………………………………

Second Part

Relationship between main stakeholders in the Jordanian tourism sector

43- How much important from your point of view building a strong partnership between the public and private sectors in order to enhance the development of the tourism sector in Jordan?
……….
……….
……….

44- What are the most important motivations for building such a partnership: (try to sort them according to the their importance from 1-5 where 1 is the most important)

Penetrating new markets ( )
Sharing knowledge on the way to improve product and marketing ( )
Enhancing workers skills ( )
Reducing costs and increasing returns resulting from the management efficiency ( )

Building a comprehensive strategy for tourism sector in Jordan ( )
Make the use of available resources more efficient ( )
Increasing the integration between various product components ( )

45- *Which of the following fields do you think it necessary to establish a cooperation and partnership between private and public sector in Jordan? (try to sort them according to the their importance from 1-5 where 1 is the most important)*

- *Marketing (promotion, attending the International events like exhibitions...)*
- *Commercial Distribution*
- *Production process and services providing*
- *Developing of supply and demands management systems*
- *Logistic services*
- *Tourist transport sector enhancing*
- *Technological progress and implementation of IT principles in management*
- *Others (specify…………………………………………………………..….)*

46- *What are the most important factors that make such cooperation between private and public sector gets success? (try to sort them according to the their importance from 1-5 where 1 is the most important)*

a. *Confidence between main players from private and public sectors*
b. *Maintaining balance between partners and stakeholders*
c. *Good level of communication*
d. *Performance control system*
e. *Promoting and incentivizing the cooperation by supporting all partners involved*
f. *Giving the private sector the opportunity to share the responsibility in decision making process together to the public sector*
g. *Keeping improving the contents and paradigms of cooperation to stimulate other partners who are still not involved in the process*
h. *Others (specify……………………………………………….………………..…..)*

47- *From your point of view, which are the obstacles that impede this cooperation? (try to sort them according to the their importance from 1-5 where 1 is the most important)*

a. *Some unacceptable behaviors from some partners which may make the tie between them weak*
b. *Coordination cost*
c. *Lack of good well to share resources and activities from some partners*
d. *Fear of illegitimate acquisition of private knowledge throughout such cooperation*
e. *Fear of losing of* core competence
f. *Fear of not being able to control the supply system*
g. *Government keen to retain control over tourism bodies*
h. *Absence of sincere efforts to involve private sector in designing tourism sectors plans*
i. *Others (specify………………………………………………….……………….…)*

48- *Do you think that Jordan is promoting itself well as tourist destination? (* ***yes*** *or* ***No*** *), give three reasons for your answer:*

a. ……………………………………………………………………………………………………
b. ……………………………………………………………………………………………………
c. ……………………………………………………………………………………………………

49- *What is the kind of this promotion:*
   a. *Public*
   b. *Private*
   c. *Mixed public and private*

50- *Which are the objectives of that promotion?*
   1. ………………………………………………………………………………………………………
   2. ………………………………………………………………………………………………………
   3. ………………………………………………………………………………………………………

51- *Can you mention for us some of projects conducted to promote Jordan as a tourist destination?*
   1. ………………………………………………………………………………………………………
   2. ………………………………………………………………………………………………………
   3. ………………………………………………………………………………………………………

52- *Are there any promotion plans conducted with neighboring countries? If yes, Specify :*
   1. ………………………………………………………………………………………………………
   2. ………………………………………………………………………………………………………
   3. ………………………………………………………………………………………………………

53- *What the incentives offered for investors in Jordan regarding the tourism sector?*
   1. ………………………………………………………………………………………………………
   2. ………………………………………………………………………………………………………
   3. ………………………………………………………………………………………………………

54- *What are problems and obstacles that face the investment inflow to tourism sector in Jordan?*
   1. ………………………………………………………………………………………………………
   2. ………………………………………………………………………………………………………
   3. ………………………………………………………………………………………………………

<u>Third part: National tourism system and the relationships between the stakeholders:</u>

55- *How can describe your relationship between private sector and public sector?*

………
……………………………………………………………………………………………

56- *Are you giving the private sector the right to participate in some of responsibilities and decisions that interest tourism sector?*

………
……………………………………………………………………………………………

57- *How do you see the relationship between MOTA and other authorities , i.e. ASEZA , Petra Region Authority,…est.?*

………
……………………………………………………………………………………………

58- *Are you willing to get involved more in the decision making regarding tourism strategies? How can you contribute to these strategies?*
   1. ………………………………………………………………………………………………………
   2. ………………………………………………………………………………………………………
   3. ………………………………………………………………………………………………………

59- *Which are the main tasks that should be carried out by the private sector rather than public? And why do you find it is important for tourism development in Jordan?*
   1. ………………………………………………………………………………………………………
   2. ………………………………………………………………………………………………………
   3. ………………………………………………………………………………………………………

60- *How do see the contribute of Jordan Tourism Board (JTB) to Jordan tourism sector? specify four points:*

1. ……………………………………………………………………………………………………
2. ……………………………………………………………………………………………………
3. ……………………………………………………………………………………………………
4. ……………………………………………………………………………………………………

61- *How do you describe the relationship between JTB and private sector?*

……………………………………………………………………………………………………..
…………………………………………………………………………………………………….

62- *In which manner do you evaluate the coordination between tourism sector stakeholders?*

……………………………………………………………………………………………………
……………………………………………………………………………………………………
……………………………………………………………………………………………………
……………………………………………………………………………………………………

63- *Does the private sector takes its role in enacting rules and legislations to regulate tourism sector?*

…………………………………………………………………………………………………….

…………………………………………………………………………………………………….

64- *What are the consequences of multiplicity of actors which oversee the tourism sector in Jordan (Ministry of Tourism and Antiquities, JTB, Petra Region Authority, ASEZA …est.)?*

……………………………………………………………………………………………………
……………………………………………………………………………………………………
……………………………………………………………………………………………………
……………………………………………………………………………………………………

65- *Do you see that it will be better unifying all bodies concerned in tourism issues in one? Why?*

……………………………………………………………………………………………………
……………………………………………………………………………………………………
……………………………………………………………………………………………………
……………………………………………………………………………………………………

66- *How this Tourist Body should be governed:*

Public ☐

Private ☐

Mixed ☐

67- *Of which stakeholders it should be composed? (for instance, T.O, Travel agencies, Tourist Transport,….)*

……………………………………………………………………………………………………
……………………………………………………………………………………………………
……………………………………………………………………………………………………

68- *What are the most important functions that should matched by all parties:*

Function	*Currently working*	*To activate in future*
Building strategies for tourism sector		
Projects presentation		
Marketing and promotion		
Organizing the relationships with national, regional and international bodies		
Preparing plan and events schedule		
Establishing a tie with local communities and authorities		
Controlling policies impact on both tourism activities and society		

Public transport		
Others …………………..		

69- How do you see investment environment in Jordan?

………
…………………………………………………………………………………………………

70- What are the current marketing projects and what are the future plan that should be realized?

Project Sort	*Currently existed*	*To be realized*
Networking between product parties		
Preparing high quality promotional materials, i.e. brochures…est.		
Creating public and private promotion bodies		
Creating an efficient Website		
Launching a fascinating brand		
conducting a periodic statistic analysis		
Organizing big promotional events like festivals…est.		
Others………………		

Fourth part: Jordan tourism in 2020:

71- *How the Jordanian product should be in 2020?*
……..
……..

72- *What are the main segments that ought to be satisfied?*
……..
……..

73- *How should the relationships with other neighboring countries be?*
……..
……..

74- *What are the strategies that should be implemented in the tourism sector?*
……..
……..

Fifth part: Feedback on tourism sector:

75- *Do find that the necessary information on the Jordanian tourism sector which you may need available?*
……..
……..

76- *Do you think that the Jordanian statistical system regarding tourism efficient?*
……..
……..

77- *How can you describe the relationship between national tourism bodies and national statistical offices?*
……..
……..

Date *Signature of interviewed person*

Appendix B: ***Tourist Questionnaire***

Dear tourist,

You are kindly requested to fill this questionnaire that will give me the feedback about the National Tourism System in Jordan, with my best wishes to have a nice stay in Jordan.

First Part:: Personal Data

Nationality : …………………………….

Gender:

Male ☐ *Female* ☐

Age:

☐ *Under 24* ☐ *25-34* ☐ *35-44* ☐ *45-54* ☐ *Over 55*

Social Status:

Single ☐ *Married* ☐

Education:

☐ *H.S. Diploma or less*
☐ *College Diploma (2 years)*
☐ *B.A Degree (4 years)*
☐ *Graduate studies (Master and PhD)*

Job Description:

Employed (subordinate) ☐

Self employed ☐

Student ☐

Housewife ☐

Retired ☐

Other ☐

Second Part:

Sites Visited or supposed to be visited in:

☐	*Amman*	☐	*Jerash*	☐	*Petra*	☐	*Aqaba*	☐	*Dead Sea*
☐	*Wadi Rum*	☐	*Umm Qais*	☐	*Ajloun*	☐	*Madaba*	☐	*Other………*

Is this your first to Jordan:

Yes ☐ *No* ☐

How did you know about Jordan? (more answers are allowed)

I already know Jordan	☐	*Articles/ Ads on magazines and newspapers*	☐	*Expositions*	☐
Ads on the street	☐	*TV*	☐	*Radio*	☐
Internet	☐	*Friends/Relatives*	☐	*Ads in shops*	☐
Travel agencies/ T.O	☐	*Communication by mail*	☐		
School/University	☐	*Other (Specify)………………………….*			

Do you think that you will visit Jordan again:

Yes ☐ *No* ☐

Have you crossed Jordan in transit to another country:

Yes ☐ *No* ☐

1)……………………………….2)…………………………………3)……………………………………4)…………………………………

You are travelling as:

As an individual ☐ *In a collective trip (package) paid in advance* ☐

Did you come with someone? (more answers are allowed)

- ☐ *No, I'm alone*
- ☐ *With my friends*
- ☐ *With my family*
- ☐ *With a planned group of people*

How many nights you are going to spend in Jordan:

Less than 1 night *1-2 nights* *3-4 nights* *5-6 nights* *more than 7 nights*

☐ ☐ ☐ ☐ ☐

What is your main kind of accommodation used during your stay in Jordan?

Classified Hotel *non-classified hotel* *apartments and suits* *Camps* *in friends or relatives house*

☐ ☐ ☐ ☐ ☐

Transport methods to come to Jordan, or what is the Jordanian port used or please indicate which means of transport you travelled to Jordan:

Air *Sea* *Car*

☐ ☐ ☐

How did you book your accommodations or how was your stay booked?

- ☐ *In advanced, directly with the accommodation*
- ☐ *In advanced, directly through travel agent or T.O*
- ☐ *Upon arrival at the accommodation*
- ☐ *Though internet*
- ☐ *In another way, i.e. ……………………………*

How long prior to the trip did you make the reservation?

- ☐ *Less than 1 month ago*
- ☐ *Between 1 and 3 months ago*
- ☐ *Longer than 3 months ago*

How often have you travelled to Jordan during the last five years and stayed overnight (not including this trip)?

1 time *2 times* *3 times* *4 times* *5 or more*

☐ ☐ ☐ ☐ ☐

I can consider Jordan as a tourist destination :

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

I see the Jordanian product very attractive:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

Jordanian tourist transport sector is efficient :

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

Jordanian public transport is efficient:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

Services quality is adequate:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

Services prices are adequate:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

Services prices in respect to the quality offered are adequate:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

Jordanian packages price are competitive in comparison with other visited countries packages:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

Tourist Information points in the touristic sites are adequate:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

I am satisfied of accommodations level in Jordan:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

One of outstanding characteristics of Jordan is the courtesy and the character of local people:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

I have found the Jordanian typical foods delicious:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

Jordan is safe tourist destination:

I strongly Agree *I agree* *am not sure* *I disagree* *I strongly disagree*

☐ ☐ ☐ ☐ ☐

How satisfied are you about accommodations quality offered to you during your stay in Jordan?

Very satisfied *Satisfied* *neutral* *dissatisfied* *very dissatisfied*

☐ ☐ ☐ ☐ ☐

How satisfied are you about transport services quality in Jordan?

Very satisfied *Satisfied* *neutral* *dissatisfied* *very dissatisfied*

☐ ☐ ☐ ☐ ☐

How satisfied are you about your stay in Jordan?

Very satisfied *Satisfied* *neutral* *dissatisfied* *very dissatisfied*

☐ ☐ ☐ ☐ ☐

Do you see Jordan as:

☐ *Tourist Resources and Services*
☐ *Only Resources*
☐ *Only Services*
☐ *Neither resources nor services*

Which of following sites has an effective local tourism system (resources and services):

☐ *Amman* ☐ *Jerash* ☐ *Petra* ☐ *Aqaba* ☐ *Dead Sea*

☐ *Wadi Rum* ☐ *Umm Qais* ☐ *Ajloun* ☐ *Madaba* ☐ *Other………*

How do describe Jordan now?

- ☐ *Much more than what I have expected*
- ☐ *More than what I have expected*
- ☐ *As I have expected*
- ☐ *Worse what I have expected*
- ☐ *Much worse than what I have expected*

How do you valuate services included in the package:

- ☐ *Much more than what I have expected*
- ☐ *More than what I have expected*
- ☐ *As I have expected*
- ☐ *Worse what I have expected*
- ☐ *Much worse than what I have expected*

How have you found the accommodations quality offered in Jordan?

- ☐ *Much more than what I have expected*
- ☐ *More than what I have expected*
- ☐ *As I have expected*
- ☐ *Worse what I have expected*
- ☐ *Much worse than what I have expected*

What is the main purpose of your visit to Jordan?

- ☐ *Leisure, recreation and holidays*
- ☐ *Visiting friends and relatives*
- ☐ *Business and professional (not including congresses)*
- ☐ *Congress*
- ☐ *Study or school trip*
- ☐ *Stop over on the way to another country*
- ☐ *Religion/pilgrimages*
- ☐ *Sportive activities*
- ☐ *Other reasons*

How do you characterize your motive for your holiday in Jordan?

- City trip
- Beach holiday
- Holiday in the countryside
- Cultural sites
- Archeological sites

Which of following activities did you do during your stay in Jordan?(you can answer more than one)

- Shopping
- Visiting museums
- Visiting academic institutes and libraries
- Attending cultural festivals visiting old parts of cities and small villages
- Taking a trip by care
- Diving in Aqaba Gulf
- Camping in Wadi Rum
- Visiting natural reserves
- Attending sportive events
- Eating a typical Jordanian foods in traditional restaurant

Please indicate per category filling this card how much you and your party have spent during your stay in Jordan?

Category	*Amount spent*
transport	
Accommodation	
Food and beverage	
Souvenirs and purchases	
Total amount spent	

What did you appreciate most during your stay in Jordan? (you can choose only two)

- Archeological sites visited
- History of Jordan
- Modern cities
- Friendly people
- Security

- *Fair weather*
- *Cultural events and festivals*
- *Restaurants and accommodation*
- *Natural sites*
- *services quality*

what did you least appreciate during your stay in Jordan ?(choose max two)

- *Transport quality*
- *Accommodation quality*
- *Restaurants quality*
- *Price level*
- *Lack of recreational activities and events*
- *Lack of some essential services in the archeological site; i.e. ....   Toilets*

Score your satisfaction level of the following components of Jordanian product?

aspect	***Scores from 1-10*** *10= max satisfaction,* *1 =minimum satisfaction*
Archaeological sites	
Environment and natural sites	
Accommodation	
Food	
Transport	
Price	
Shopping	
Information	
Safety	
Courtesy and local people character	
Recreational activities	
Overall opinion	

Average scores to be assigned by tourists in Jordan ***8.61***