5.5 Social Environment

(1) Survey Method

A social attitude survey, probably the largest and most comprehensive of its kind in Jordan, was carried out for the Study Team by the Middle East Center for Human Studies in August 1995. Survey questionnaires were completed by 524 households in or near the historic sections of Amman, Madaba, Karak, and Salt, with the survey implemented with rigorously controlled sampling and interview methods. The results present an interesting picture of the people of Jordan, who they are, how they live, how they think of themselves, and above all, how they see tourism development in the country.

(2) Attitudes Towards Employment

The percentage of respondents who were employed persons was 58% for men and 18% for women. The low labor-force participation rate for women can be considered a mark of a traditional society (Figure 5.5.1).

Young men are those perhaps most conscious of the employment situation and show positive attitudes such as expressing a desire to obtain a job in the tourism industry. Dissatisfaction with present job was most prominent among young unmarried men (21%); 71% of them showed willingness to participate in training courses for tourism, much higher than unemployed young men (52%) or unemployed fathers (41%) (Figure 5.5.2). Willingness to work in the tourism industry is highest among unmarried men (52%), followed by unmarried women and fathers (41%) (Figure 5.5.3). The young are more willing to work in the tourism industry than their seniors; consider, for example, that unmarried women are far more willing to work in the tourism industry than their mothers (41% vs. 21%) (Figure 5.5.2).

Unemployment among persons with higher education is high and, worse, they have less desire to work.

(3) Attitudes Toward Tourism

A concern that a cultural bias in Jordan may deter tourism development does not seem to be well founded. Figure 5.5.4 shows that nearly nine in ten (87%) thought that Jordan should encourage more tourists to come. However, 10% thought otherwise, suggesting care should be taken not to ignore this minority view, which is held primarily by mothers who have had little previous contact with tourists. More tourists are considered to bring in benefits by 94%, with an increase in

employment opportunities the reason cited by the largest number of respondents (28%). Some 6% responded that they expect no benefit from tourism development, which indicates that one half of those who do not desire more tourists nevertheless admit that tourism has benefits. More than 36% of the respondents perceived no disbenefit of tourism.

More than 60% stated that they would accept foreign tourists at their own home, perhaps an indication of the famous Jordanian hospitality. Understandably, foreign tourists are considered most acceptable in their city (79%), followed by neighborhood (74%), and home (63%). The acceptance is higher for Arab tourists, followed by non-Arabs. Some resistance was observed toward accepting Israeli tourists (Figure 5.5.4).
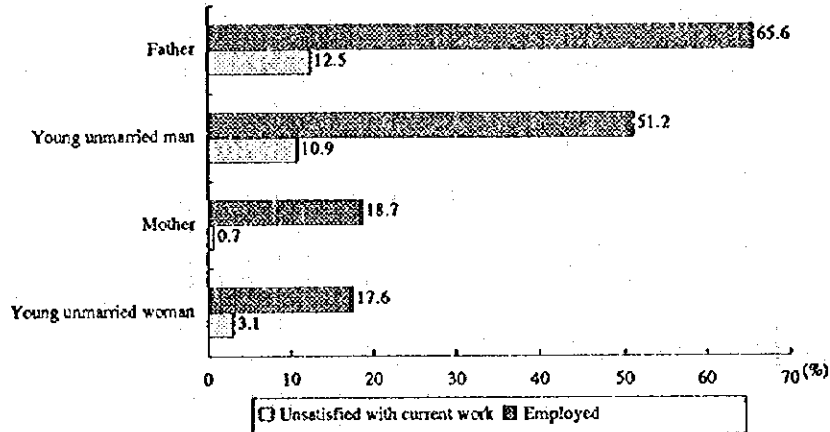
The young and the better educated are more accommodating of tourism than others. Similarly there are differences by gender with men more open toward tourism than women.

It is revealing that a positive attitude toward tourism was more found to be prominent among working respondents and a negative feeling was much stronger among non-working respondents. This may indicate the importance of keeping unemployment low in order to facilitate positive social changes (Figure 5.5.5).

Although only a small percentage of respondents expect that benefits from tourism development would be realized by their immediate family, 63% stated that they expect benefit to their community and 90% expect Jordan to enjoy some kind of benefit from tourism development (Figure 5.5.6). Figure 5.5.7 shows that there were some locational differences, with more respondents in Salt and Karak expecting benefits from tourism development than those in Amman and Madaba. This spatial difference may indicate the difference due to the degree of availability of job opportunities and their actual experience with tourism industries, actual or hearsay.
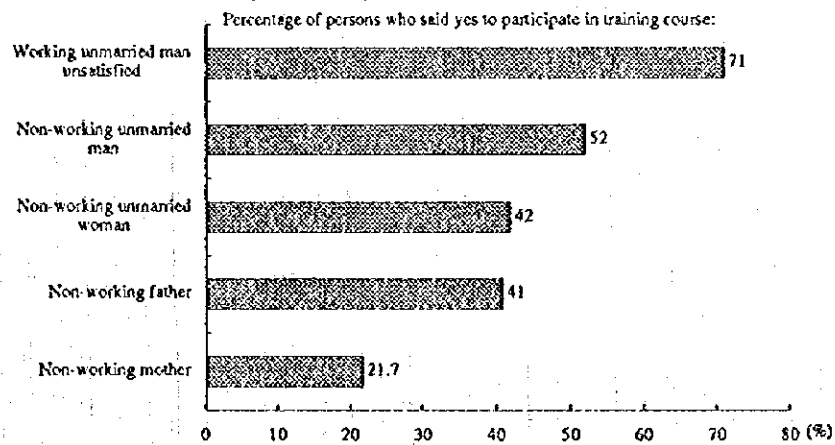
As Jordan's young population is receiving better education than did their parents and grandparents, attitudes towards tourism may become increasingly open.

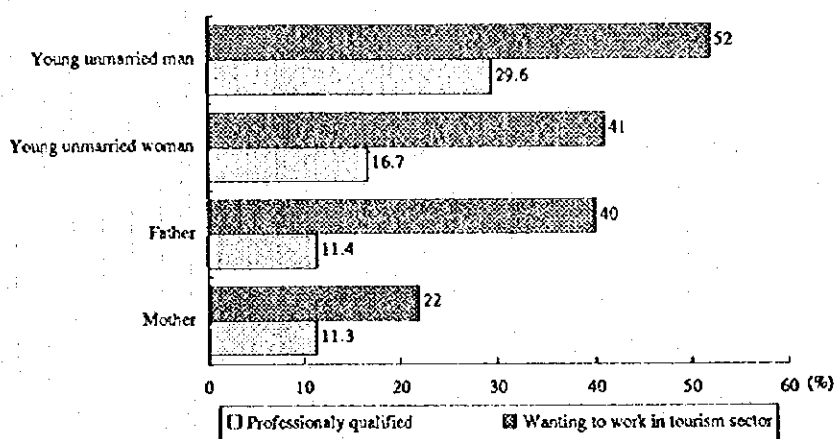## Figure 5.5.1 Labor-Force Participation Rate by Sex and Married Status

Father: 65.6 | 12.5
Young unmarried man: 51.2 | 10.9
Mother: 18.7 | 0.7
Young unmarried woman: 17.6 | 3.1

0 10 20 30 40 50 60 70 (%)

☐ Unsatisfied with current work ☒ Employed

Source: JICA Social Attitude Survey (1995)

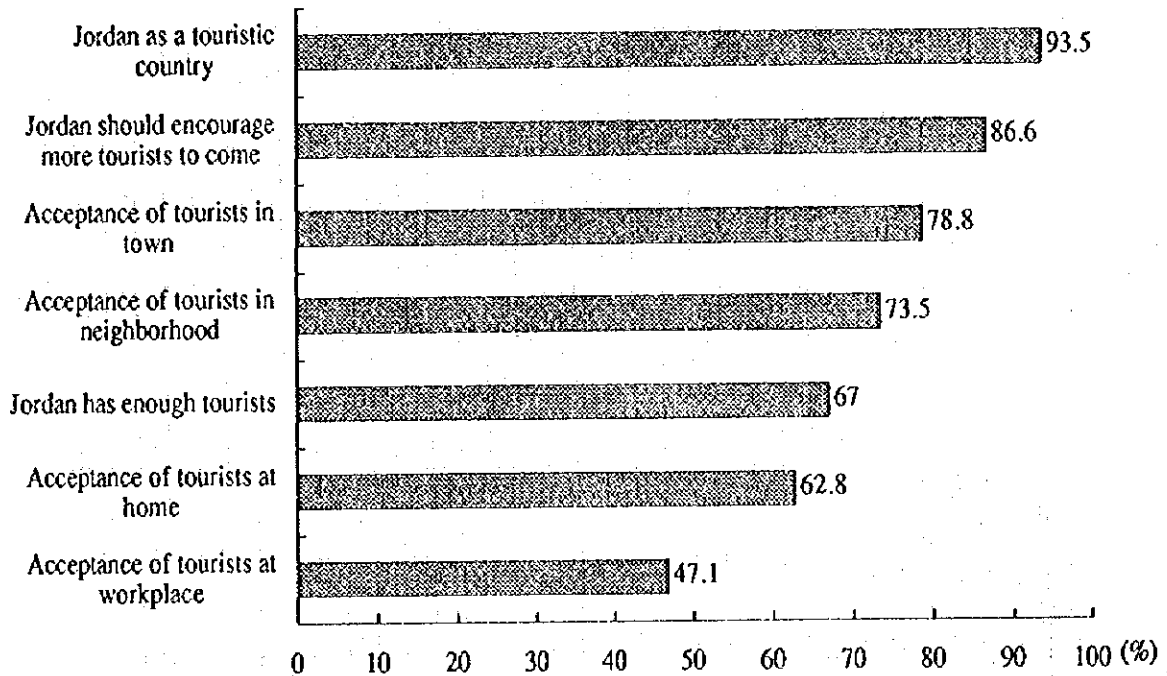## Figure 5.5.2 Willingness to Participate in Training Courses for Tourism (Percent)

Percentage of persons who said yes to participate in training course:

Working unmarried man unsatisfied: 71
Non-working unmarried man: 52
Non-working unmarried woman: 42
Non-working father: 41
Non-working mother: 21.7

0 10 20 30 40 50 60 70 80 (%)

Source: JICA Social Attitude Survey (1995)

Figure 5.5.3 Willingness to Work in the Tourism Sector

Young unmarried man: 52 | 29.6
Young unmarried woman: 41 | 16.7
Father: 40 | 11.4
Mother: 22 | 11.3

0 10 20 30 40 50 60 (%)

☐ Professionaly qualified ☒ Wanting to work in tourism sector

Source: JICA Social Attitude Survey (1995)

Figure 5.5.4 Jordanian Attitude Toward the Tourism Development

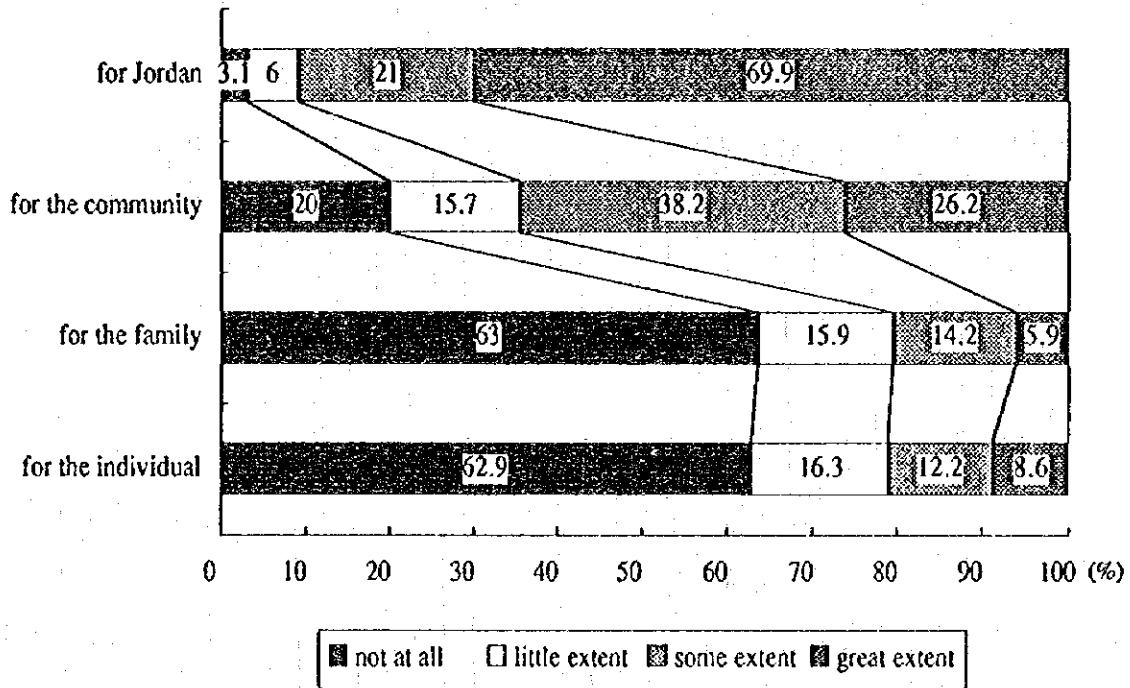| Category	Value
Jordan as a touristic country	93.5
Jordan should encourage more tourists to come	86.6
Acceptance of tourists in town	78.8
Acceptance of tourists in neighborhood	73.5
Jordan has enough tourists	67
Acceptance of tourists at home	62.8
Acceptance of tourists at workplace	47.1

0 10 20 30 40 50 60 70 80 90 100 (%)

Source: JICA Social Attitude Survey

Figure 5.5.5 Respondents of Positive and Negative Impact Toward Tourism

Category	Value
Stimulation of business	59
Larger foreign currency earning	46.9
No disbenefit	36.5
Disrespect for culture and tradition	34.9
More business opportunity	27.1
Cultural exchange	25.8
Disrespect for religion	16
Disbenefit unknown	13.2
Better standard of living	12.6
Negative influence for youth	10.5

0 10 20 30 40 50 60 (%)

☐ Negative impact ■ Positive impact
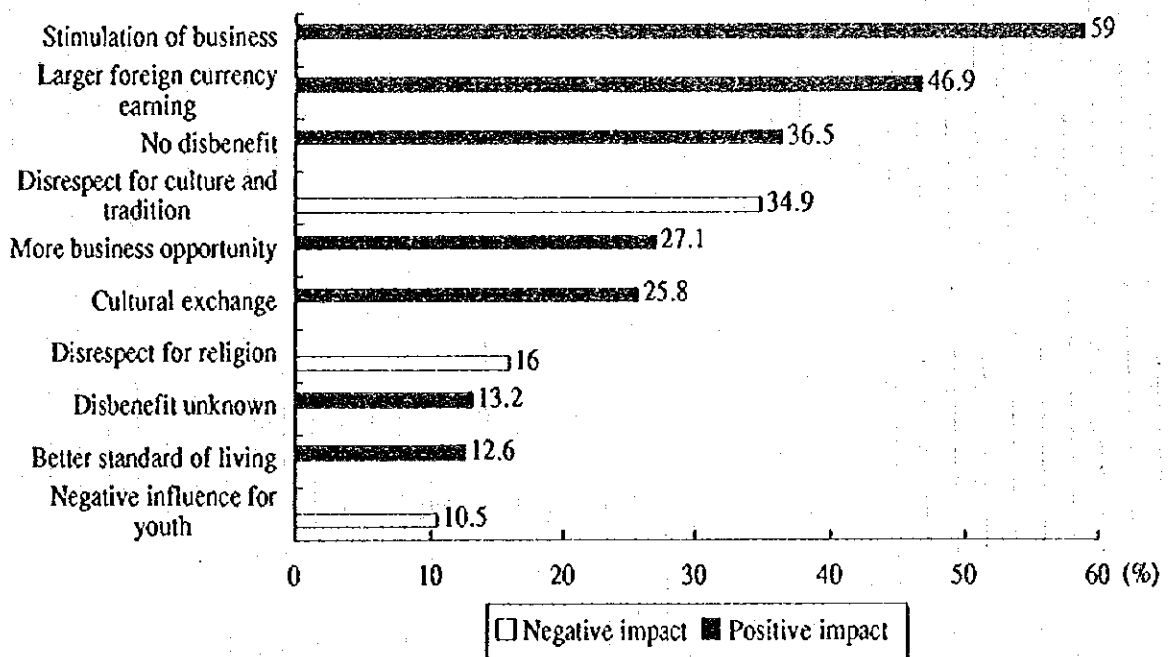
Source: JICA Social Attitude Survey (1995)

Figure 5.5.6 Benefits from Tourism Development

for Jordan 3.1 6 | 21 | 69.9

for the community | 20 | 15.7 | 38.2 | 26.2

for the family | 63 | 15.9 | 14.2 | 5.9

for the individual | 62.9 | 16.3 | 12.2 | 8.6

0 10 20 30 40 50 60 70 80 90 100 (%)

■ not at all □ little extent ▨ some extent ▨ great extent

Source: JICA Social Attitude Survey (1995)

Figure 5.5.7 Benefits from Tourism Development by Locality

Percentage of expecting no benefit:

for the community
25.3
5.8
7.7
14

for the family
64.4
65.4
48.1
45

for the individual
63.1
65.4
44.2
49

0 10 20 30 40 50 60 70 (%)

■ Salt □ Karak ▨ Madaba ▨ Amman
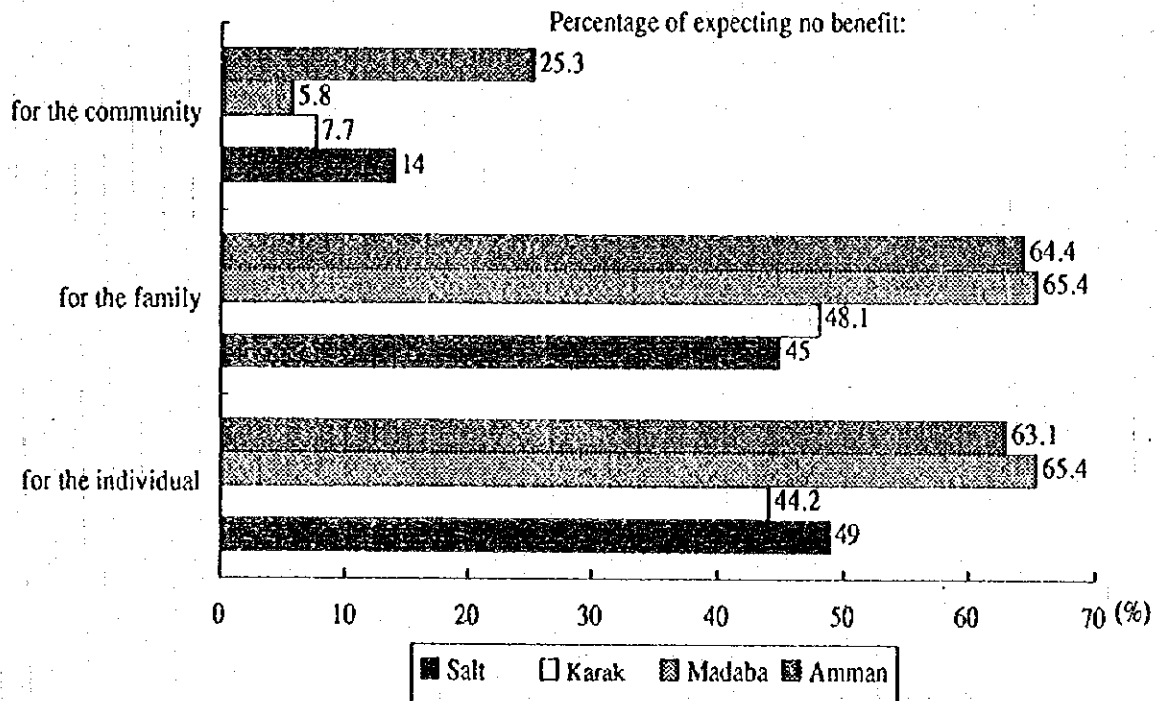
Source: JICA Social Attitude Survey (1995)

5.6   International Cooperation

The types of international cooperation that assist tourism are varied, and so are the donors. Table 5.6.1 shows locations of various ongoing as well as past tourism related projects with international donor participation.

It is apparent that since the Peace Initiative, there is increasing interest from these agencies in developing tourism in Jordan. As of June 1995, donor programs amounting to US$ 77 million in total are in progress or proposed, improving several specific locations in Jordan. The breakdown by geographic area is as follows :

Table 5.6.1   Foreign Donor Tourism Related Proposed Projects by Location

Location	Donor	Amount (million US$)	Share
Jerash	Italy	2.7	3%
Amman	USAID	3.3	4%
Madaba	Italy/USAID	4.2	5%
Dead Sea	EIB	12.2	16%
Petra	USAID/WB/GTZ	41.5	54%
Aqaba	USAID/WB/GTZ/EIB	13.5	17%
Total		77.4	100%

Remarks: Information is approximate; the status of each project varies. Projects not focused on specific geographic areas are excluded.
Source: Ministry of Planning

With over half the total value (54%), the dominance of Petra in these programs is obvious. The Dead Sea component is made up of only one project, the proposed EIB infrastructure project. Donors are devoting the largest share to improve Jordan's only major tourist magnet, Petra, and propose to build up the two coastlines, the Red Sea and Dead Sea areas.

The following text gives an idea of the main projects designed to assist tourism development. It includes sectoral programs, as well as projects focusing on specific locations.

(1)   Multilateral Cooperation

a.   **The World Bank Tourism Sector Project (in formulation):** A total of US$ 40 million as a World Bank Loan has been suggested for major improvements at Petra, Wadi Musa and Shawbak, and possibly at the Dead

Sea. Institutional strengthening of MOTA is also intended, and two preliminary consultancies are planned for 1995. Final approval may be granted in mid 1996.

b.   **The Jordan Rift Valley Project (WB/US Trade Development Administration; in progress):** Among other sectors, the Rift Valley's potential for tourism development is to be evaluated. However, the study will focus primarily on other sectors, including the Dead Sea-Red Sea Canal. In part it will require the collaboration of Israel.

c.   **Aqaba Region Comprehensive Development Study (EU; planned for 1995):** This is a multi-sectoral study focusing on the Eilat-Aqaba vicinity designed to coordinate infrastructure development in the area. Tourism is to be considered among other sectors.

d.   **Dead Sea Coast Infrastructure Development (European Investment Bank; proposed):** A sum of US$ 12.2 million is planned for investment in tourism infrastructure in this area.

e.   **Aqaba South Coast Infrastructure Development (European Investment Bank; proposed):** A sum of US$ 10 million is planned for investment in tourism infrastructure in this area.

f.   **Small & Medium Enterprise Development for Industry & Tourism (European Investment Bank & Industrial Development Bank):** A total of ECU US$ 12 million has been reserved to support private investments in Jordan industrial and tourism enterprises through both loans and equity participation.

(2)   **Bilateral Cooperation**

Of all foreign agencies, USAID has by far been the most active in supporting tourism in Jordan. However, a number of other countries also are assisting.

a.   **CERM Project (USAID; in progress):** Started in late 1994, this project may last as long as five years, and is designed to improved established tourist attractions at Petra, Madaba and Amman-Citadel (see description in section 3.3).

b.   **Creation of a Computerized Tourism Information System (USAID; in progress):** USAID is providing technical assistance and equipment to MOTA (total value US$ 200,000) to set up a computerized tourism data
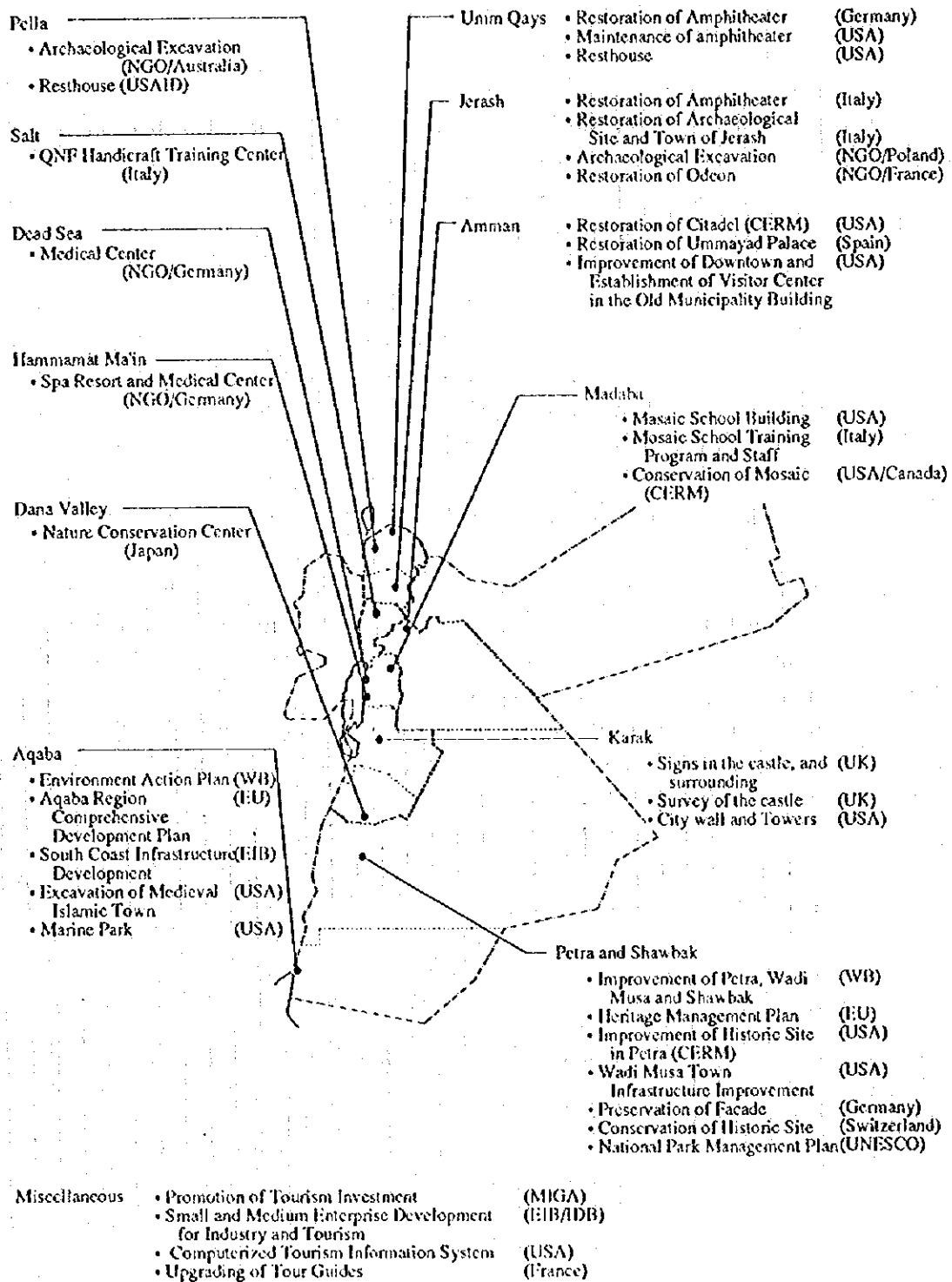
network to manage different types of data.

c. **Wadi Musa Town Infrastructure (USAID; planned):** A water system, sewerage system, and waste water management plan are to be developed in this program (cost US$ 7 million).

d. **Stone Preservation Work at Petra (GTZ of Germany; in progress):** Some of the extraordinary facades carved into stone at Petra are suffering deterioration; this program is training experts to use scientific techniques to diagnose problems and rescue these facades from further deterioration.

e. **Madaba Mosaic School (Italian Government; in progress):** This school is training Jordanians in modern restoration techniques. It has a gallery of mosaics on display, and also serves as a tourist attraction that portrays applied technology in an interesting setting (cost 590 million Italian Lira, about US$ 370,000).

(3) Non-Government Cooperation

A wide range of non-government activities (e.g., wildlife management, environmental protection, archaeological excavation programs, joint tourism promotion campaigns) are not coordinated by any organization because they involve so many different areas of activity. Travel trade representatives indicate that an attempt to coordinate foreign tourism promotion by several of the Eastern Mediterranean countries through the Eastern Mediterranean Tourism Association, has basically failed because of the lack of clear action by the association's members which include national tourism agencies. This is an area where some regional coordination may be effective, and which donor agencies are willing to fund.

Figure 5.6.1 Tourism Related International Cooperation Projects

Pella
- Archaeological Excavation (NGO/Australia)
- Resthouse (USAID)

Salt
- QNF Handicraft Training Center (Italy)

Dead Sea
- Medical Center (NGO/Germany)

Hammamat Ma'in
- Spa Resort and Medical Center (NGO/Germany)

Dana Valley
- Nature Conservation Center (Japan)

Aqaba
- Environment Action Plan (WB)
- Aqaba Region Comprehensive Development Plan (EU)
- South Coast Infrastructure (EIB) Development
- Excavation of Medieval Islamic Town (USA)
- Marine Park (USA)

Umm Qays
- Restoration of Amphitheater (Germany)
- Maintenance of amphitheater (USA)
- Resthouse (USA)

Jerash
- Restoration of Amphitheater (Italy)
- Restoration of Archaeological Site and Town of Jerash (Italy)
- Archaeological Excavation (NGO/Poland)
- Restoration of Odeon (NGO/France)

Amman
- Restoration of Citadel (CERM) (USA)
- Restoration of Ummayad Palace (Spain)
- Improvement of Downtown and Establishment of Visitor Center in the Old Municipality Building (USA)

Madaba
- Mosaic School Building (USA)
- Mosaic School Training Program and Staff (Italy)
- Conservation of Mosaic (CERM) (USA/Canada)

Karak
- Signs in the castle, and surrounding (UK)
- Survey of the castle (UK)
- City wall and Towers (USA)

Petra and Shawbak
- Improvement of Petra, Wadi Musa and Shawbak (WB)
- Heritage Management Plan (EU)
- Improvement of Historic Site in Petra (CERM) (USA)
- Wadi Musa Town Infrastructure Improvement (USA)
- Preservation of Facade (Germany)
- Conservation of Historic Site (Switzerland)
- National Park Management Plan (UNESCO)

Miscellaneous
- Promotion of Tourism Investment (MIGA)
- Small and Medium Enterprise Development for Industry and Tourism (EIB/IDB)
- Computerized Tourism Information System (USA)
- Upgrading of Tour Guides (France)

Source: JICA Study Team

5.7 Tourism Information Management

(1) Analysis of Prevailing Environment

a. Computerization in Jordan

Computers are used throughout Jordan in private companies and public organizations. In Amman there are a number of computer-related software companies and hardware dealers. At present, their services are mostly applied for business purposes and they differ from the application which were prepared for general public, such as bank cash dispense service. However, certain private companies provide some kind of information services which are useful for visitors.

b. Computerization in Government

To understand the prevailing conditions a number of government departments were visited to establish the extent of computerization within the government.

Lands and Survey Dept. Computer & Information System
The Lands and Survey Department owns a computer system D/B(RDB) and a "Geographic Information System(GIS)." Information is managed centrally within a separate department which has its own operational and maintenance procedures.

Ministry of Planning, Regional Planning Dept.
The Ministry of Planning uses "LAN" for information management. The Department owns a "Regional Information System (RIS)" and has its own operational and maintenance procedures. (At MOP, a coordination effort among USAID, GTZ, and JICA is being undertaken.)

National Information Center (NIC)
The NIC is the leading organization for network computing in Jordan. It has established a network to communicate with NICs and independent networks in each ministry and company. It has its own data exchange, and operational and maintenance procedures. It was reported, however, that the Center does not set a high value on network computing at this time.

Computerization in MOTA
MOTA did not have a system or network for tourism information management until 1994. In 1995, a project to install two systems, MIS/TDN and Info. Tourist System, was in progress. (As to the System Structure, see Figure 5.7.1)

- **Management Information System/Tourism Data Network**

The Management Information System/Tourism Data Network system is being supplied by USAID in 1995, for the purpose of supporting tourism information management in MOTA. This system will have a total on-line system including LAN/WAN configuration. A local consulting company is developing appropriate software for MOTA.

System Structure

This system is a total network system, which will use LAN/WAN. MOTA Headquarters, MOTA branch offices, and the visitor center will have P.C. terminals, which will be inter-connected by this network system. Functions of data gathering, data input, data modification and output, and a database will be additionally installed to the system. This system will make it possible to supply the following information:

Information Supplied
- Tourism statistics information
  - Number of visitor arrivals/departures in the country per month
  - Number of visitor arrivals/departures in the country by nationality
  - Number of visitors per tourist report
  - Purpose of visit
  - Money consumption
- Facility information.
  - Accommodation facility
  - Number of Employees at accommodation facility
  - Attraction facility
  - Transportation facility

- **Info. Tourist System**

The Info. Tourist System is being developed independently by MOTA for the purpose of the providing tourism information to tourists, with support by a local consulting company. This system is expected to be installed by the end of 1995.

System Structure

This information system will use Stand Alone type terminals, and tourist information data will be supplied by FD (floppy disk). In MOTA, FD will be used at the first stage, and changed later to CD-ROM depending on increasing data at the second stage, and finally data will be provided by a Network System. These information terminals will be set up at five-star hotels, airports, MOTA offices and each visitor center, and provide the following information for tourists:

Information Supplied
- Tourist information
  Sightseeing resort guidance
  Attraction information at tourist report
  Accident and disaster
- Facility information
  Accommodation
  Attraction facility
  Transportation
  Availability

c. Computerization in Private Companies

Some software companies were visited to understand the prevailing environment. In private companies, there is a high level of knowledge and skill in computer technology, and companies are very ambitious to use computers in business. They are eager to gain the latest computer technology. But there are not enough engineers who have such knowledge and skills.

(2) Assessment

a. System Engineers Required at MOTA

The two systems, MIS/TDN and Info. Tourist System, will have to be maintained by MOTA, but there are not enough systems engineers. It is necessary to get enough engineers and train them at the earliest opportunity.

b. Data Gathering

At present each ministry gathers information independently. There is no interconnecting network between and among ministries for information exchange.

Had NIC attained its purpose fully as a leading organization of network computing in Jordan, each department could provide information to NIC and access NIC to obtain information depending on its needs at any time, and this could result in the possibility of obtaining more information without duplicating effort.

Figure 5.7.1   System Structure in MOTA
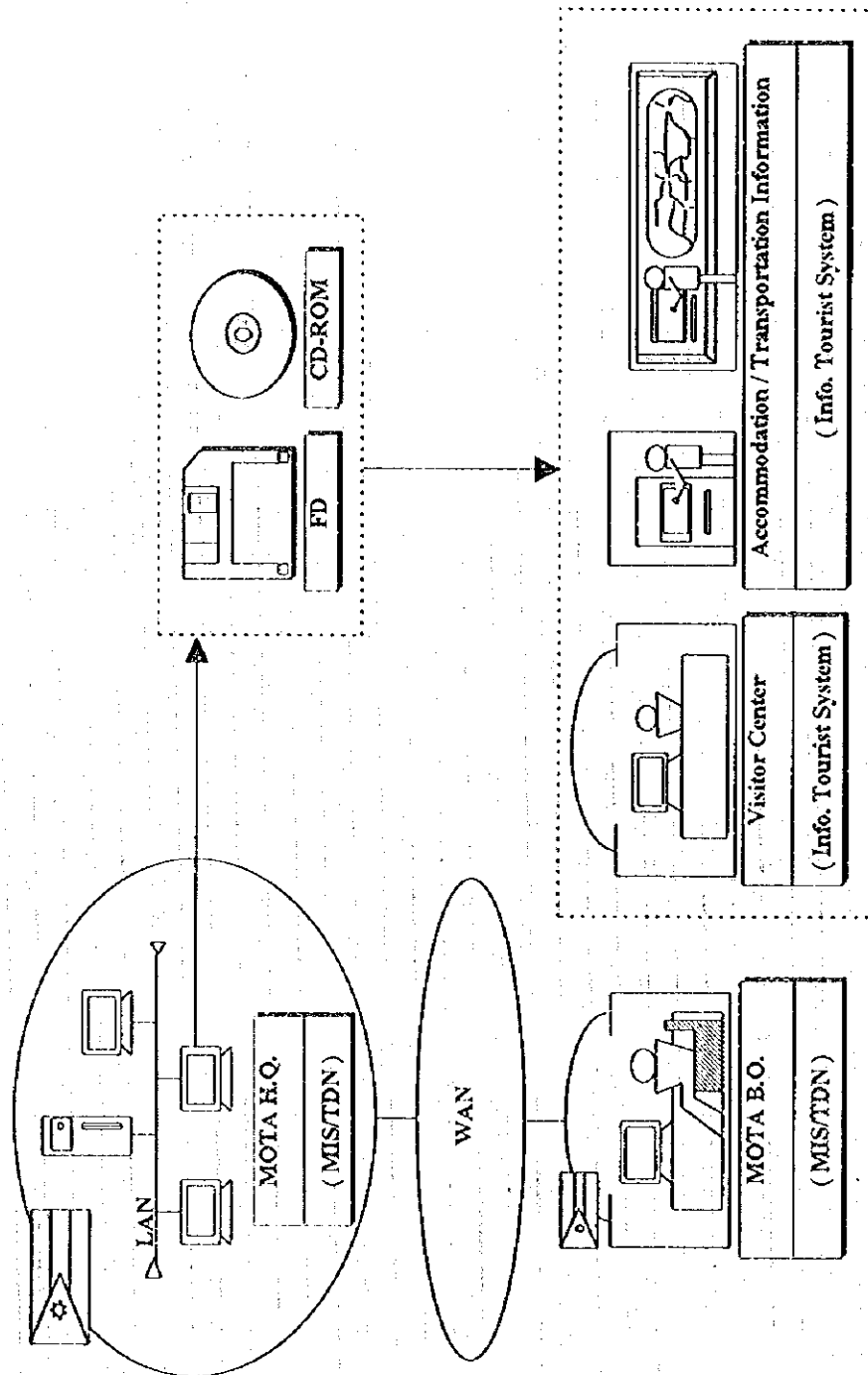
Source: JICA Study Team

Chapter 6.

National Tourism Development Strategy

Chapter 6. National Tourism Development Strategy

6.1 Assessment of the Situation

International tourism, now the top source of foreign exchange in Jordan, is estimated at around 13 percent of the gross inflow of foreign exchange to the country including private and official transfers. Tourism is the "oil" of Jordan. The importance of tourism to Jordan seems to be well understood by its people with nine out of ten believing that tourism should be encouraged and that more tourists will result in greater benefits to Jordan.

This expectation of course is the reflection of recent growth in tourist arrivals. General international tourist arrivals in 1995 are expected for the first time to exceed the number of tourists coming from the Gulf Cooperation Council (GCC) countries. Package tours primarily from Europe and, to a lesser extent, from the Americas have started coming in large numbers. Israeli tourists have begun to visit. The total number of tourist arrivals in 1995 excluding those from GCC countries is expected to exceed 150 percent of that last year. Many in the government believe that Jordan may not be able to cope with such an increased number of tourists in the near future.

Many in the private sector have expressed their desire to invest in the tourism sector. MOTA has been flooded with inquiries on opportunities. Other agencies such as the Jordan Valley Authority and the Aqaba Region Authority have come up with development plans with an emphasis on tourism-related development.

Most Jordanian citizens believe that the benefits from tourism development would primarily accrue to the nation, to a lesser degree to the community they belong, and little to themselves personally, although there are some locational differences; more in Salt and Karak expect benefits from tourism development than those in Amman and Madaba. This spatial variation in attitudes may reflect differences due to the degree of availability of job opportunities and experience with tourism industries, actual or hearsay. Young people are relatively more positive than the old and they are also more willing to be trained for employment in tourism industry.

One should not be misled, however, by the recent influx of international tourists. Figure 6.1.1 illustrates the point. Excluding Israeli tourists, the estimated number of tourist arrivals in 1995 is not much different from the number of tourist arrivals one would expect by taking the 1989 total and the average Middle East tourist growth rate of 4.0 percent per annum. Between 1992 and 1993 tourist arrivals in Egypt decreased by 700,000 as shown in Figure 6.1.1; between 1993 and 1994, a

further decrease of considerable size was said to have taken place. Jordan must have absorbed a significant percentage of this as a windfall gain; the country will need to make a considerable effort to retain this gain once the security situation in Egypt is restored. Considering that surrounding countries such as Syria have started to make major efforts to promote tourism development, Jordan must at least keep up with them to maintain its competitiveness in the international tourist market.

Some 93 percent of tourists interviewed said they chose Jordan because of its history and culture. All other attractions captured less than 2 percent of tourists. Virtually all visit Petra, a dangerous situation. If anything happens to Petra or to the tourist market for that matter, Jordan's tourism would be ruined. An effort must be made to keep Petra from losing its tourism value. At the same time, diversification of tourism products must be pursued. With the existing constraint of entering Petra through the Siq (gorge) entrance, the expected number of visitors to Petra will reach the site's capacity by 2000. Even with the opening of other entrances, which may well be of less tourism value than the Siq entrance, Petra's capacity will limit the number of tourists in the not-too-distant future as illustrated in Figure 6.1.2. Without diversification, Jordan's tourism will be severely limited.

With diversification clearly needed, the question is where to start Figure 6.1.3, showing the results of the tourist interview survey, indicates the percentages of tourists who rated various items as "good." However, one must discount the results by as much as (say) 50 percent, as people ordinarily are polite in answering questions asked by host-country people in the host country. Thus even tourist information, which objectively must be considered "poor," was rated as "good" by 51 percent of the survey respondents. Although Petra and Wadi Ram received high ratings, "tourist attractions" were rated relatively low and the "Amman urban amenity" was not rated highly. "Service facility" also received a relatively low approval rating. What international tourists are saying is that Jordan lacks modern tourism core functions.

For example, Amman, which is by far the most important point of entry/exit for international tourists, is rated low because it lacks the core functions of modern tourism. Such functions include the capital's usual role as a hub to surrounding tourist attractions, which in Amman's case are also insufficient as mentioned above.

Amman is, in Jordan, the dominant place of stay for tourists, particularly for multiple nights, as shown in Figure 6.1.4. But because of the inadequacy of Amman as a tourist core city with insufficient tourist attractions, opportunities for earning more tourist money is lost.

The average length of stay in Jordan has been declining as the number of tourists,

particularly those in package tours, increases, as shown in Figure 6.1.5. Many package tours feature Jordan as a minor part of their Middle East tour circuits (see Figure 6.1.6). If Amman's position is not strengthened relative to that of leading cities in surrounding countries, the average length of stay in Jordan will continue to decline.

In order to diversify, new products and new tour routes must be developed and new markets must be opened. It is safe to say, however, that Jordan will never become a truly mass market destination no matter how much effort is spent on the development of new products and new markets. The basic character of Jordanian tourism will remain centered around its rich history and culture. The survey results suggest that a radical departure from this basic line may well be futile.

The relatively low approval rating for "transport" indicates there is much to be desired in the improvement of infrastructure.

With the expansion of Jordanian tourism, needs for human resource development are becoming acute. Diversification will put further requirements in human resource development in that types and quality of tourism workers new to Jordan will be needed in large quantity. Young people in Jordan were found particularly eager to be trained and to work in the tourism industry. This is the time to satisfy the aspirations of the young.

Many of Jordan's tourist attractions, historic and natural, are fragile. Their preservation must be continuously pursued so that their value as attractions can be maintained and enhanced.

"Sanitary conditions" was the category rated lowest among international tourists. This suggests that environmental improvements are indeed a pressing matter.
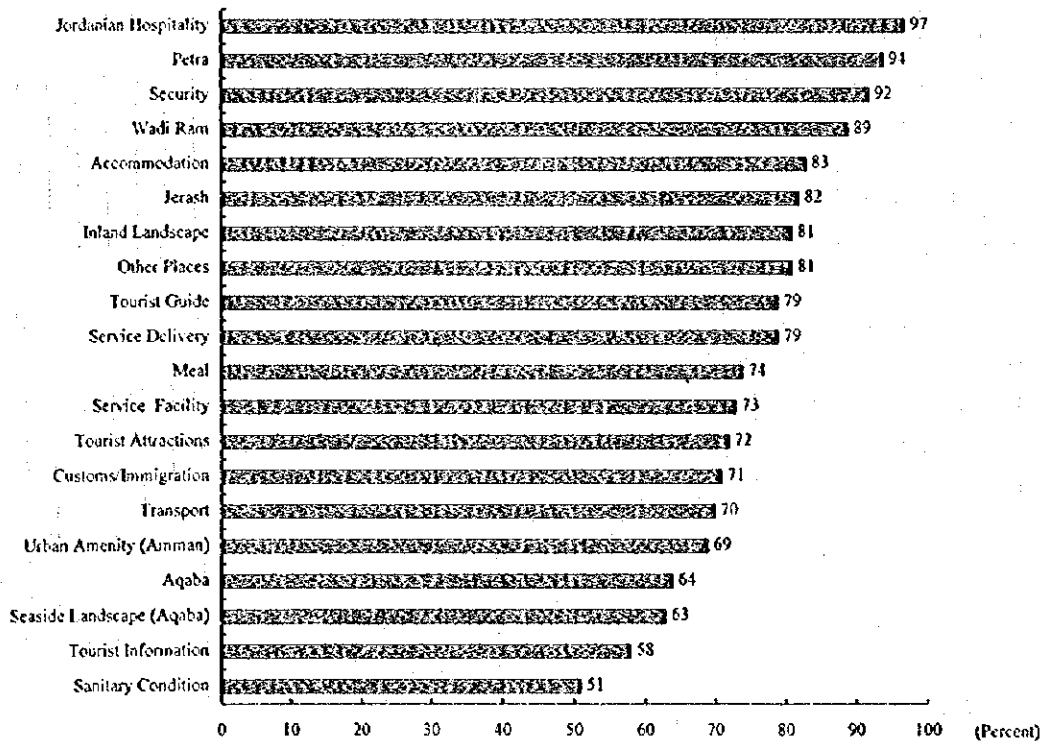
Finally, it was thought that the above describing the rather dismal state of preparedness for tourism in Jordan was a result of the over-presence of the Government in the operation of tourism sector. The sector appears to be in need of re-structuring with appropriate actions to be taken in time in response to market demand.

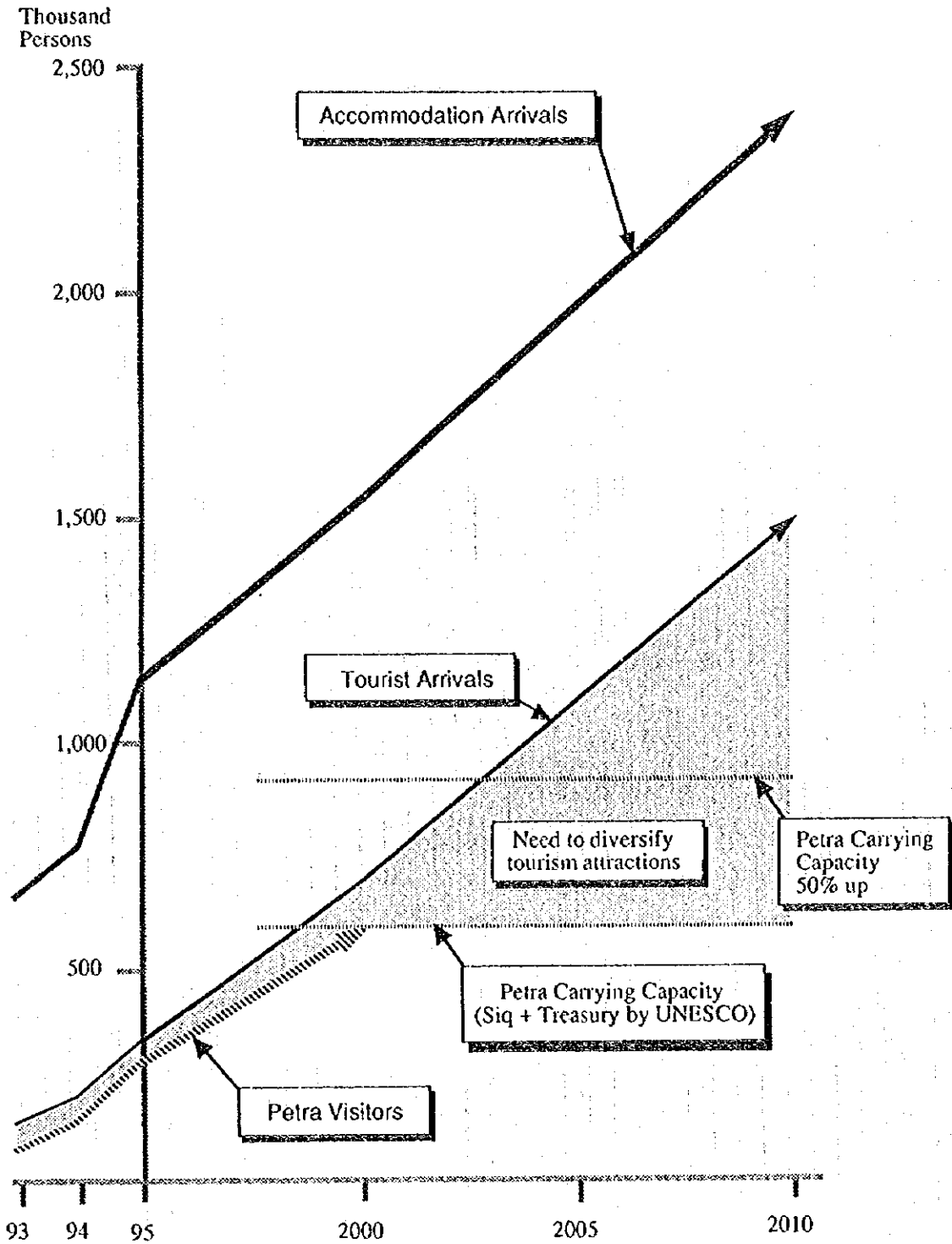## Figure 6.1.1 Tourist Arrivals in Jordan and Egypt
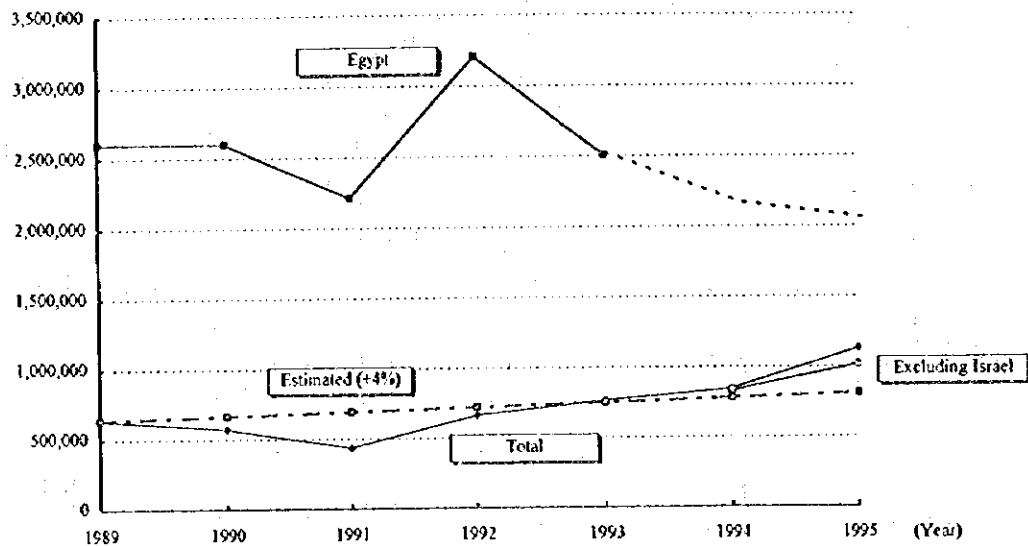
Source: MOTA/JICA Study Team

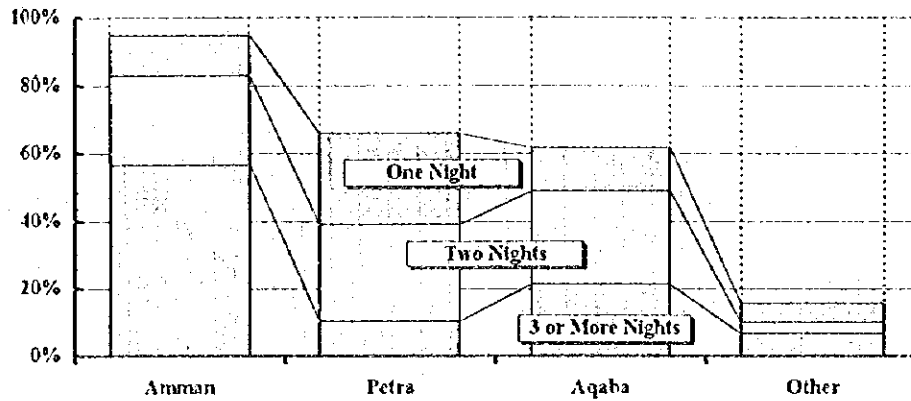## Figure 6.1.3 Percent of Tourists who said "Good" for:

Category	Percent
Jordanian Hospitality	97
Petra	94
Security	92
Wadi Ram	89
Accommodation	83
Jerash	82
Inland Landscape	81
Other Places	81
Tourist Guide	79
Service Delivery	79
Meal	74
Service Facility	73
Tourist Attractions	72
Customs/Immigration	71
Transport	70
Urban Amenity (Amman)	69
Aqaba	64
Seaside Landscape (Aqaba)	63
Tourist Information	58
Sanitary Condition	51

Source: JICA Social Attitude Survey (1995)

Figure 6.1.2 Need to Diversify

Thousand
Persons

Source: JICA Study Team

Figure 6.1.4 Number of Nights

100% ┬
80% ┤
60% ┤
40% ┤ One Night
20% ┤ Two Nights
0% ┤ 3 or More Nights

Amman   Petra   Aqaba   Other

Figure 6.1.5 Average Length of Stay

Persons   Nights

Ave. Length of Stay
(Right Scale)

No. of Tourists On Package Tours
(Left Scale)

1989   1990   1991   1992   1993   1994   1995

Based on (Jan - Jun)
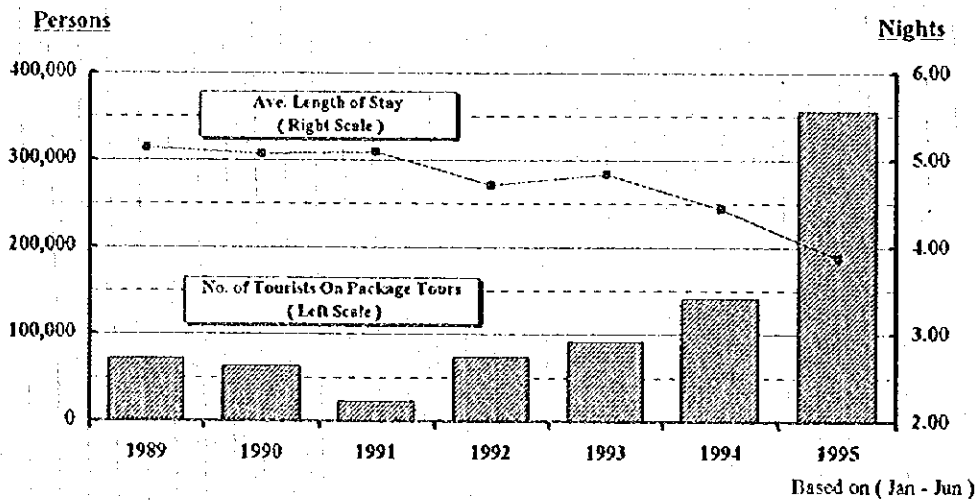
Figure 6.1.6 Distribution of Number of Nights

U.K.

Aqaba
29%

Amman
32%

Petra
29%

British Airways Holiday 8 Days

Petra
25%

Syria
25%

Aqaba
8%

Egypt
25%

Israel
17%

Voyages Jules Verne 13 Days

France

Aqaba
10%

Petra
40%

Amman
50%

Bhar Voyages 11 Days

Amman
14%

Lebanon
14%

Petra
14%

Syria
58%

Air France Jet Tour 15 Days

Japan

Syria
45%

Amman
22%

Petra
22%

Egypt
11%

JTB Look Tour 11 Days

Amman
18%

Petra
18%

Syria
64%

Travel Sekai 14 Days
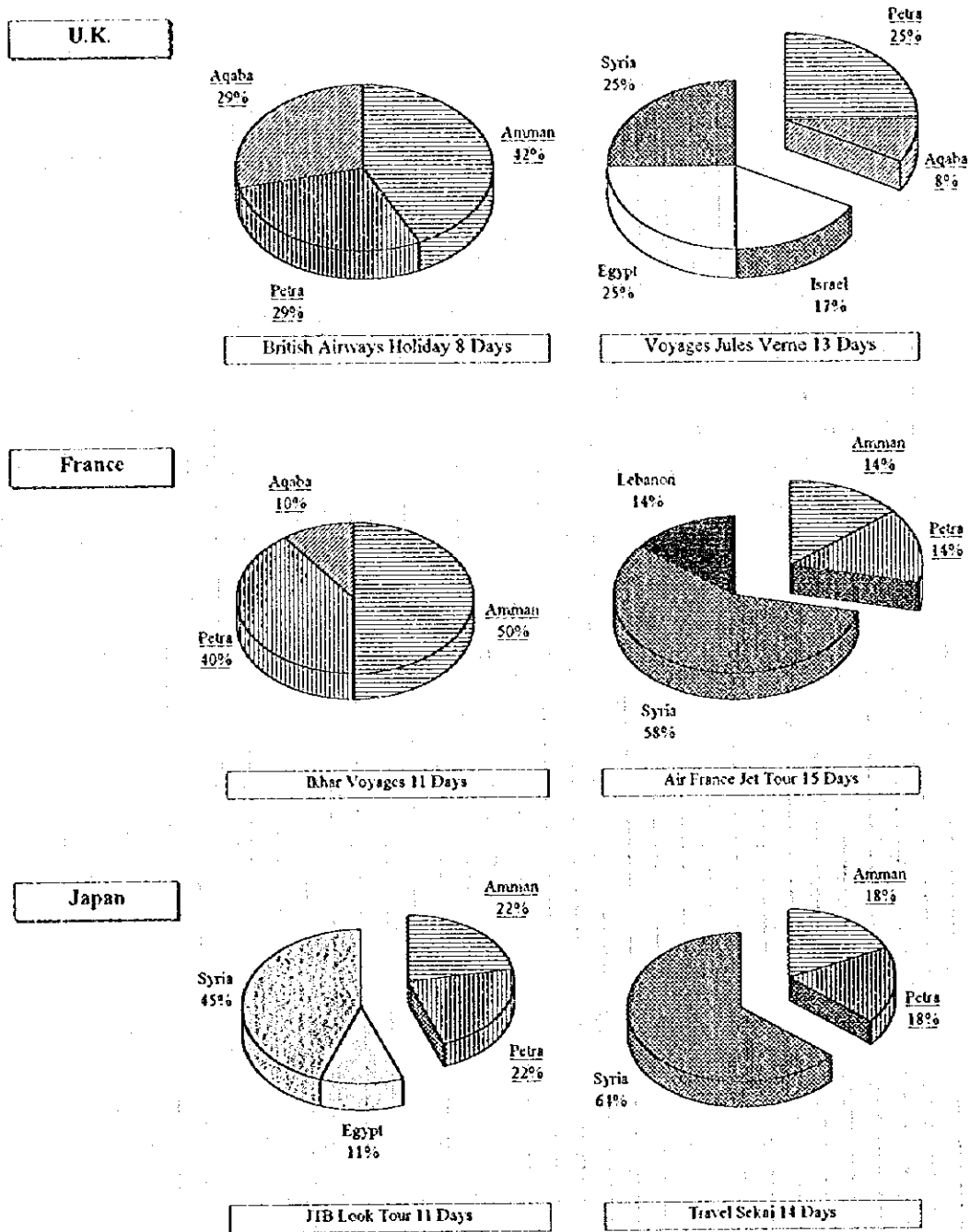
Source: JICA Study Team

6.2 Tourism Development Principles and Strategies

6.2.1 Development Principles

The foregoing analyses have led to the identification of four basic principles for tourism development in Jordan.

(1) Recognition of the Importance of Tourism as the Prime Mover of the Jordanian Economy

Jordan possesses an advantage in tourism resources relative to its resources in other economic sectors. Tourism therefore has already become the country's number one foreign-exchange earner and one of its largest economic sectors. Tourism in Jordan has good potential for further growth, leading the entire Jordanian economy, which must grow to absorb a rapidly increasing labor force. Tourism is the "oil" of Jordan. Its vital importance to the nation should be recognized as such. In this regard, it is also important that the operation of tourism industries be borne by the private sector to the extent possible in order to attain efficiency and better responsiveness to the market.

(2) Broadening of Tourism in Jordan from Antiquities to Cultural

In order for the tourism sector in Jordan to continue to grow, it is essential to transform it from its current narrow focus on antiquities to one involving much broader cultural tourism.[1] This transformation is required because: (i) the number of visitors to antiquity sites must be controlled in order to avoid a spoiling of their attractiveness (the bulk of future growth must therefore come elsewhere); (ii) Jordan's market appeal must at least be maintained at its current level compared to the international competition, and (iii) the length of stay per tourist should be increased. By such a broadening of the tourism products on offer, and only through such a broadening, can Jordan claim its rightful place in the Middle Eastern and worldwide tourism market by establishing itself as a major destination rather than as a side trip. For that purpose it is absolutely necessary to create an international-level tourism core in Jordan, a role that only Amman can fill.

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[1] The term "cultural tourism" here refers to a type of tourism that allows tourists to experience various activities in an atmosphere of a culture different from their own, including not only ancient ruins and relics but a broader range of tourism products such as historical buildings of the more recent past, distinct man-made and natural scenery, traditional folk activities such as festivals, ethnic foods, and natural wonders. The term "cultural" is used here because the subject market segment of tourism in Jordan is not the general mass market; rather it should be the up-market segment of "cultured" people as opposed to simple pleasure-seeking masses.

(3) Positive Preservation of Tourism Resources

Jordan's primary tourism resources will continue to be its cultural heritage and natural wonders, which must be preserved. A simple "leave them alone" attitude is grossly inadequate and undesirable. Effort and investment must be made to implement positive protection measures that will enhance the value of the country's tourism resources.[2]

(4) Recognition of Private and Government Roles

Tourism is essentially a service industry as a whole, serving a complex market that is highly volatile and prone to changes in taste and fads. It is therefore important to induce service providers to be as responsive to the market as possible. Private initiatives in investment and operation are therefore most desirable, as opposed to direct governmental operation. The government role is to facilitate such private investment and operation by providing infrastructure and framework, and supplement where shortfall in private initiative exists.

This does not mean that the role of the Government is small. One the contrary, in the case of Jordan, where supporting infrastructure and institutional and regulatory framework to encourage private investment in tourism sector are still in their infancy, the Government could play a significant role in leading the sector by well targeted investments and institutional development.

6.2.2 National Tourism Development Strategy

The assessment of the existing situation and the world tourism market as presented in the foregoing sections under the four principles identified above has lead to the formulation of seven basic strategies for tourism development in Jordan. Figure 6.2.1 illustrates how these principles and strategies are related. The following sections describe each of the strategies.

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[2] Examples of positive preservation are the creation of clearly fenced tourist paths, waste management, and the creation of tourist centers.

Figure 6.2.1 Tourism Development Principles and Strategies
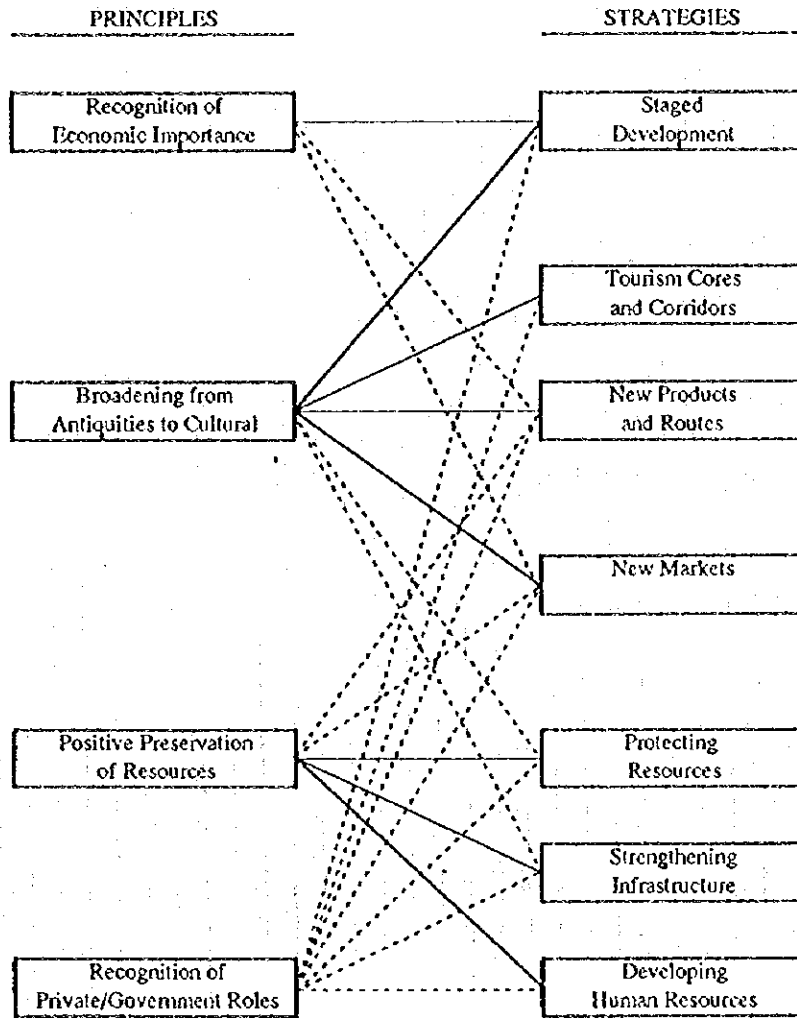
Source: JICA Study Team
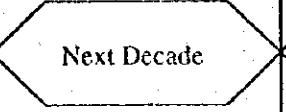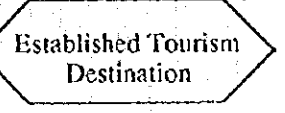
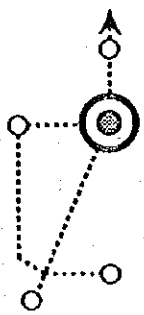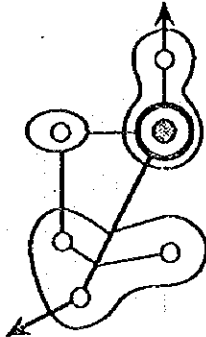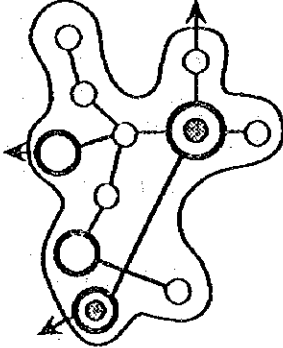## 6.3   Staged Development Based on Regional Potential

Tourist sites often develop in a predictable fashion. Thus Petra has evolved from a site known only to the local inhabitants, to its discovery by a few adventurous Europeans, to the archaeological treasure known only to an exclusive society of archaeologists at the turn of the century, to a coveted site for a limited number of affluent and culture-seeking visitors mainly from Europe in the early post-World War period, and finally into the most popular tourist destination in Jordan, one which is featured in all cultural tour packages. Three main stages of tourist destination development can be identified: a pioneer stage, a growth stage, and a mature stage.

Jordan may be regarded as a single destination that is subject to these three stages of tourism development. Figure 6.3.1 examines Jordan's position in these stages in relation to the following criteria: tourist volume, patterns of development, and their features, market strategy, and target market segments.

Jordanian tourism today can be considered as evolving from the pioneer stage into the initial growth stage. In order to accelerate its tourism development and to remain competitive in the regional and world destination markets, it is essential for Jordan to aggressively develop its potential and fully explore market opportunities, in a manner appropriate to the stage of tourism development in Jordan.

In order to be successful in the endeavor, however, the quality of tourism products must be up to the market expectations. Above all, degradation of tourism resources must be prevented. Adequate infrastructure must also be in place, and agreeable services must be provided. Again, depending on the region of Jordan, such strengthening can only be undertaken in stages. These staged improvements must be synchronized with a coherent marketing strategy.

· Figure 6.3.1 Development Stages and Development Pattern

Stage	Pioneer Stage	Growth Stage	Mature Stage
Tourist Volume	Tourism in Jordan at Present		Number of Tourists Arrivals
	Past	Next Decade	Established Tourism Destination
Development Pattern Legend: ◉ Gateway O Tourist Site ····Corridor ◎ Tourism Core			
Development Pattern Features	- isolated and small scale development - initial tourism development	- cluster development - corridor formation - diversification of tourism products	- network formation - tourism core & establishment of tourist routes
Market Strategy	- traditional market - Europe	- traditional market expansion - net market exploitation • geographic (source markets) • product-wise (soft adventure incentive, seminar)	- established traditional market - new market expansion
Target Market Segment	- archeology - religion (pilgrimage) - small seaside holidays	- culture tourism (archeology, history, culture) - soft adventure	- urban tourism folk life tourism - MICE tourism

Source: JICA Study Team

6.4 Tourism Core and Corridor

Jordanian tourism at present is characterized by isolated development around such major tourist sites as Petra or Aqaba. Modern tourism requires the development of tourism cores (minimum one for a small destination and more than two for a larger one) provided with modern and efficient urban infrastructure, service facilities, amenities and leisure activities. These cores act either as a gateway for international tourists or a distribution center of visitors to individual tourist sites and attractions across the country.

Tourism cores not only assure the comfort and amenities of modern tourists. They will also offer Jordan a new opportunity of earning more tourist dollars at the same time diversifying its line of tourism products. To name just one typical example, Amman or Aqaba could be an attractive site for regional/international gatherings and conferences if there were a state-of-the-art convention hall supported with related services and personnel. This will open up a new avenue of tourist dollars for what modern tourism defines as "Urban and MICE (Meeting, Incentive, Conference and Event) tourism."

At present both Amman and Aqaba are far from fulfilling the role of an established tourism core. Extensive improvement is needed in this area, particularly in Amman.

New tourism cores will emerge in Petra and the Dead Sea area with the increase in accommodation capacity and the improvement in tourism support infrastructure. The Petra core will cover one-day excursions to Shawbak, Karak and Ma'an, while the Dead Sea will cover one-day excursions to Ma'in, Madaba, Mt. Nebo, Mukawir and Karak. This will have the effect of reducing the over concentration of tourists at Petra by drawing them away to other attractions within the tourist zone.

Tourist corridors are another integral element in modern tourism, linking the tourism cores and tourist sites/attractions spread over the country. Established tourist corridors not only guarantee the ease and comfort of travel for tourists, but also encourage wider distribution of tourists, thereby promoting extended sharing of the economic benefits of tourism across the country. Constant and concentrated flow of tourists may motivate imaginative entrepreneurs to create new attractions and service facilities along the corridors.

The main tourist corridor currently is the Desert Highway (Amman - Aqaba and Amman - Ramtha, East Corridor), with a secondary feeder corridor on the Kings' Highway (Amman - Karak - Petra, Central Corridor). Establishment of a third corridor is needed linking Jordan Valley, Dead Sea to Aqaba. This is tentatively named the Great Rift Valley Highway (Irbid - Dead Sea - Aqaba, West Corridor).

With the advancement of the peace process, a new East-West Corridor will also emerge between Amman and King Hussein/Abdulah Bridges.

Domestic tourism viewpoint aside, the north will neither become a tourism core nor be part of a tourism corridor for the international tourist traffic due to the following reasons:

- Jerash, Ajlun, Irbid and Umm Qays are all within an easy reach from Amman, the central and crucial tourism core city of Jordan. All these places are considered within one-day excursion zone from Amman. Future road network improvement will further fortify this tendency. World-wide trend of tour package is to select one or two base cities to stay for a longer period (i.e. in the case of Jordan itinerary, three nights in Amman and Three nights in Petra with optional day trips offered from base gateway to Jerash, Dead Sea or to Wadi Ram, in lieu of a short-hopping circuit itinerary starting from Amman to Jerash, Madaba, Dead Sea, Karak on to Petra, Wadi Ram, and Aqaba).

- The North geographically faces politically very sensitive Golan Heights, which is the focal and most difficult area for the ongoing Peace Process negotiation between Israel and Syria. New border crossing through the North to Palestine Autonomous Region/Golan Heights on the Lebanon, even if opened in the future, will not form but a side tourist route, complimenting two major corridors of Amman/Ar Ramtha/Damascus and Amman/King Hussein Bridge/Jerusalem.

Conceptual diagrams in Figure 6.4.1 illustrate development of the tourism cores and tourist corridors in the three conceived stages of development, namely, initial growth stage (1996), latter growth stage (2000) and mature stage (2010).

Figure 6.4.1 Tourism Cores and Tourist Flows
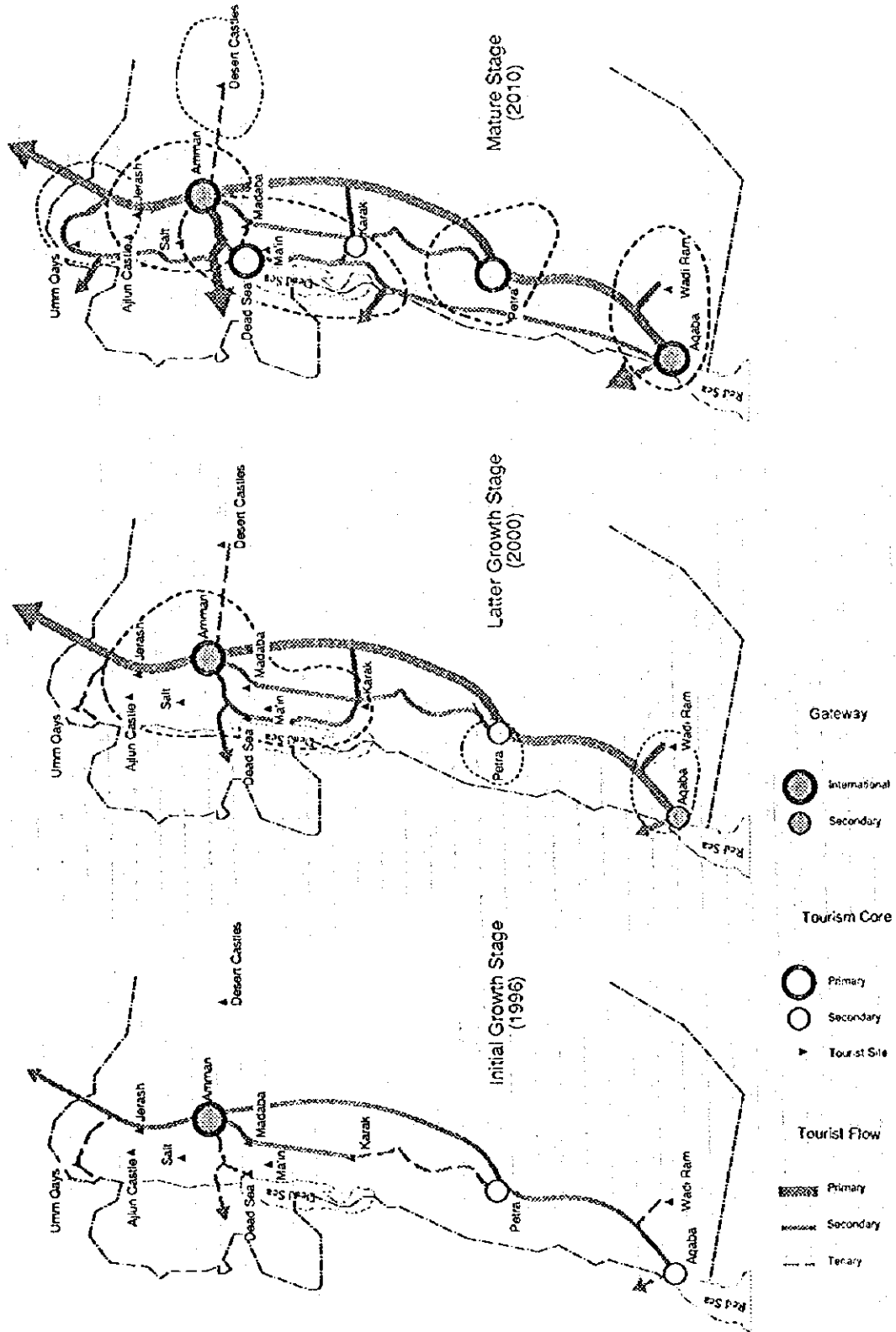
Source: JICA Study Team

6.5 New Product and Route Development

(1) Identifying Development Potentials by Regions

Traditional archaeology-focused tourism in Jordan has ignored modern tourism development techniques and does not make effective use of the country's traditional resources of historic ruins and scenic wonders. Modern tourism development thrives on both traditional resources and artificial, man-made tourist attractions and features such as theme parks or soft adventure (hot ballooning, river rafting, etc.).

The shortcomings of Jordanian tourism can be summarized as follows:

- the archaeological, historical and cultural resources are not fully developed as a tourism product (weak presentation, lack of historical/cultural/ethnographic perspectives and lack of visitor facilitation);
- the scenic wonders are almost totally ignored except for Wadi Ram;
- the poor use of precious aqua tourism at Aqaba;
- the absence of theme attraction except Kan Zaman; and
- the neglect of urban tourism

Table 6.5.1 identifies the regional potentials for resource development in the time-frames of Short Term (up to 2000), Medium Term (up to 2005) and Long Term (up to 2010).

Table 6.5.1 Regional Potentials for Resource Development.

Region / Time-Frame	Central	North	East	West	South	Tourist Corridor	Across the Regions
Immediate	• Amman urban tourism base improvement Stage 1 (access beautification, Citadel tourist trail, one stop tourist complex) • Madaba route formation, with side attraction • National Museum part open	• Jarash, Umm Qays improvement	• Desert Castle route improvement	• Madaba tourist trail/culture park • Main /Dead Sea circuit part open • "Historic Salt" completion • Main /Dead Sea circuit completion • Main /Dead Sea health/cure product introduced • Dead Sea Museum part open	• Aqaba beach front improvement • Karak and Wadi Rum improvement	• Kings Highway improvement (lookout/rest area, side attraction) • Desert Highway improvement (Aqaba approach)	• Visitor facilitation improvement at major sites
Medium	• Amman urban tourism base improvement Stage 2 (conference complex) • Hijaz Rail part operation (Amman/airport/ Qatrana) • National Museum completion	• Pella improvement		• Dead Sea Museum completion	• Dissi desert tourist core part open • Aqaba subconference center open • Jet Cat operation (Aqaba/Nuweiba)	• Great Rift Valley Highway part open (Jordan Valley/Dead Sea Drives)	• Sophistication of visitor facilitation at major sites
Long	• Amman urban tourism base improvement Stage 3 • Hijaz Rail/ prospective Damas operation			• Dead Sea resort core completion	• Dissi soft adventure base completion • Aqaba resort core completion	• Great Rift Valley Highway completion	• Network of cores and sites completion

Source: JICA Study Team

(2) Introducing New Products and New Routes

The following approaches need to be developed.

- A fresh market-oriented approach is needed in product development, namely "away from what Jordan believes appeals to tourists" to "what tourists appreciate as attractive and interesting." Historic town restoration (Historic Old Salt), nostalgic railway revival (Hijaz Railway), theme accommodation and restaurant (Tayyiba Zaman, Kan Zaman), and soft adventure (desert hot ballooning) are some examples of this innovative approach.

- Spectacular scenery is often neglected or not strongly highlighted as a tourist resource of great appeal. Scenic wonder at Wadi Mujib typifies the case, where no effort is currently made to sell this unique dramatic scenery and no facility is made available for tourists to appreciate its beauty and to spend some time around the gorge, thus missing an opportunity of earning precious tourist dollars.

- Many sites are currently presented in isolation without much effort to link other attractions and features found nearby. Jerash, Ajlun and Umm Qays are typical examples. In most tourist gateway cities in the world comparable to the size of Amman, there are package tours on a seat-sharing basis for a half or full day covering nearby sites and attractions. Presently there is no such tour on regular operation in Amman, covering Jerash or Madaba. The development of popular tourist routes and seat-sharing local package tours are needed.

Flagship products to be developed will be:

- Amman Urban Tourism vitalization (tourist street, tourist lookout, museum)
- Historic Town/District restoration (Salt, Karak, Madaba, Irbid, Fuhays)
- Scenic Tourist Spot development (lookout at Dead Sea escarpment, Wadi Mujib, Wadi Ram with rest facilities)
- Curative/Spa Tourism in Dead Sea/Ma'in
- Aqaba resort complex
- Hijaz Railway restoration/tourist operation (staged product development)
- National Park creation (Petra, Wadi Ram, Dana Valley, Dead Sea, various wadi escarpments)

The flagship development will be instrumental to focus the national awareness and interest in Jordan on tourism development. It will greatly help diversify the Jordanian tourism product line and become an effective marketing tool to stimulate the interest of the international tourists and travel trade.

In recent years, the concept of "ecotourism" has become fashionable in some of the major tourist generating countries. Assessment of situation in Jordan has lead to a conclusion that the introduction of natural wonder tourism products (Wadi Ram, Dead Sea, Wadi Mujib, etc.) is more pressing mater than "ecotourism". It will bring bigger reward of tourist receipt in terms of cost or benefit to Jordan than "ecotourism". The natural wonder tourism has largely been neglected in Jordan except of Wadi Ram. It will appeal to much broader market segment of general interest tourists and will be much easier to develop at less cost. On the other hand, "ecotourism" requires sophisticated institutional expertise and pool of qualified personnel, which Jordan needs a significant amount of lead time and investment. Even after a successful development and marketing, "ecotourism" will serve to attract only a small niche market. Well developed, diversified country may afford to have ecotourism, or a country lacking tourism resources of anything else. We consider Jordan does fall into neither of two.

6.6 New Market Development

Establishment of tourism cores/corridors and introduction of new tourist products/ tour routes will open up a wide spectrum of market opportunities never envisioned by Jordanian tourism up till now.

New products, tourist routes and corridors will also contribute to geographical expansion of the tourist-generating or source market. Jordan will experience an evolution from a fringe destination in the Middle East heavily reliant on the traditional European market into an established destination in the world market attracting tourists from new and emerging source markets as well. The diversified line of tourism products will make it possible for Jordan to expand its market base from the archaeology orientation into a much wider market base of culture, nature and curative/ holiday tourism.

Figure 6.6.1 examines the appeal level of the main tourist themes in relation to the major target markets (tourist-generating countries) and identifies the typical preference to particular groups of tourists. Customized marketing and promotion should be targeted at each market segment, fully reflecting the identified market preference to ensure the maximum return of visitors.

New market can be developed in collaboration with surrounding countries. Israeli idea of introducing tours encompassing the ancient Spice Road through Petra and Dead Sea or Exodus Trace through Jordan are worth pursuing. Similarly, collaboration with surrounding countries including Israel as well as Muslim countries would yield much higher dividend than otherwise in promoting Jordan as a hub for Muslim pilgrims from south East Asia.

Figure 6.6.1 Examination of Major Target Markets and Tourist Themes

Tourist Objects → Major Target Market ↓	Culture				Nature				Leisure		Urban		
	Archae-ology	History	Folk Life	Religion (Pilgrim-age)	Scenic Wonder	Bush-walk, Trek	Eco-watch, Study	Soft Adventure	Aqua Holiday	Curative Holiday	Urban Relaxa-tion	Incentive, Seminar	Urban Shopping
Europe — UK	High	High	High	Medium	High	High	High	High	High	Low	Low	Medium	Low
Europe — Germany	High	High	High	Medium	High	High	High	High	Low	High	Low	Low	Low
Europe — France	Medium	Medium	High	Medium	Medium	Medium	Medium	High	Low	Medium	Low	Low	Low
Europe — Italy	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	Medium	Medium	Low	High	Medium
Americas	Medium	Medium	Low	Medium	Medium	Medium	Medium	High	Low	Low	Low	Low	Medium
Israel	High	High	Medium	High	Medium	Medium	Medium	Medium	Low	Low	Low	High	Low
Up-market Arab Regions	Medium	Low	Low	Low	Low	Low	Low	Low	High	High	High	Medium	High
Japan/East Asia	High	High	High	Low	High	Low	Medium	Medium	Low	Low	Low	Low	High

LEGEND: ■ High Appeal ◧ Medium Appeal ☐ Low Appeal

6.7 Strengthening of Infrastructure and Services

6.7.1 Transport

Special emphasis should be placed on transport development that supports tourism promotion. Such development includes improvement of access to tourist sites and creation of attractive transport means and routes to diversify tour routes and itineraries.

To develop roads and other transport means for tourism, relevant institutions should be strengthened. MOTA should develop the capability to advise the Ministry of Public Works and Housing and the Ministry of Transport concerning tourist road and transport service development and support municipalities for local access improvements. Introduction of cost recovery mechanisms in line with the principle of "beneficiary pays" can enable the participation of more parties including the private sector in such transport projects. Road-side facilities such as road signs and rest areas should be provided, meeting standards for international tourists.

In addition to improvement of access to Jordan by increased air services and border-crossing facilities, the domestic transport network should be reinforced by improving the north-south corridors and adding missing east-west links. Improvement and diversification of transport means and services such as tourist buses, tourist railway services, and water and air transport, should be integrated with the road network development.

A more detailed presentation of strategies for transport development as related to tourism development, directly or indirectly, are presented in a separate volume, Part I, Volume 2 (Chapter 3).

6.7.2 Water Supply, Sewerage, and Drainage

It is essential to increase the supply of raw water, to ensure water quality, and to distribute water widely and appropriately. However, keeping pace with the growing demand will be difficult if no efforts are made to control demand.

A recommended strategy is to control water consumption by increasing water price while discounting the price of recycled water and increasing metering. Water savings will be made by promoting recycling of water at various areas such as houses, industries and tourist accommodations. For development of urban tourism, availability of water supplies should be studied in the development plans. For rural tourism, demand and supply forecasts must be required in environmental impact assessments.

Regarding sewerage, the total load can be reduced by adopting varying charges dependent on the quantity and quality, which encourage improved housekeeping for water savings, recycling and treatment. In urban areas, large tourism facilities should be connected to the sewerage system. In rural areas, high standard dedicated treatment facilities should be developed with tourism facilities based on environmental impact assessments, which should include the demand and treatment forecasts.

Drainage systems should be developed to protect the tourism resources from damages. Details of water supply, sewerage and drainage issues are presented in a separate volume, Part I, Volume 2 (Chapter 4).

6.7.3 Hygiene and Waste Management

High standard hygiene is of special importance to international hotels to maintain a favorable reputation. To upgrade the general standard, training schemes should be reinforced. Also important are monitoring the conditions and enforcing the required standards. To ensure these measures, cooperation among ministries, especially between MOH and MOTA is essential.

The objectives of waste management are to reduce litter at tourist sites and on the routes and to upgrade the management of waste to accommodate the increasing number of tourists.

The strategies include promotion of street sweeping and litter collection, improvement of the way to collect municipal solid waste especially at tourist locations and introduction of land filling for disposal of municipal solid waste to avoid negative impacts on water resources and tourists. To realize these objectives, interrelated efforts in education by campaign, technical improvements with better management, institutional improvements by cooperation of different organizations, and financially sustainable operation are required.

Details of the strategies for the hygiene and waste management as related to tourism development are presented in a separate volume, Part I, Volume 2 (Chapter 5).

6.8   Human Resource Development

(1)   Needs for Expansion and Upgrading of Jordanian Human Resources for Tourism Industry

According to MOTA statistics in 1993, 14.7% of workers employed by the hotel subsector in Jordan are non-Jordanians and the percentage goes up to 32% in Aqaba. There are several reasons for this situation. Firstly, there was lack of public awareness of the importance of the tourism industry in the Jordanian economy, which resulted in less interest in this sector by Jordanian workers. Secondly, the slow growth of the market in the past did not create enough employment opportunities. Thirdly, Jordan has a limited number of qualified workers in this sector. Fourthly, there is a surplus of qualified workers in Egypt who are willing to work in Jordan for lower wages.

However, as discussed earlier, the tourism industry in Jordan is in fact one of the key sectors of the economy. Jordanian hospitality is well known in the region. If traditional Jordanian hospitality can be offered by well-trained Jordanian workers, the attraction of the Kingdom may be significantly increased. Taking into consideration the current high rate of unemployment in Jordan and her large potential for tourism development, it is much needed to expand and upgrade the human resources of the tourism industry. Otherwise its potential will not be successfully tapped.

(2)   Projection of Job Demand by Tourism Industry

The scope of activities within the tourism industry is too wide to identify the specific trades required by the tourism industry. Thus, the projection in this study shall deals with job demand by hotel and five other related subsectors discussed in section 4.6.

The type, class and size of hotel varies according to its location and the customer targeted all of which determine the class of worker required. The average worker per room employment rate in Jordan (1993) was 0.61 workers per hotel room. This study assumes that the ratio will increase to one worker per room in 2000 and 2010 with the improvement in the level of services.

Assuming that the employment by the other 5 subsectors is 50% of the direct employment in hotel industry, the total requirements by the tourism industry should be increased by a factor of 1.5. The projected number of hotel and other related workers is shown in Table 6.8.1. An average annual demand will be 1,600 workers from 1996 to 2010.

Table 6.8.1 New Jobs to be Created by Tourism Industry

Activity	2000	2010		
		Scenario A	Scenario B	Scenario C
Incremental number of workers(hotel)	3,200	8,700	11,100	15,200
Others	1,600	4,400	5,600	7,600
Total	4,800	13,100	16,700	22,800

Source: JICA Study Team

Note: Others cover travel agencies, rent-a-cars, tourist shops, tourist guides, and camel and horse guides. Travel agencies have about 50% of share.

(3) Training Requirements

It is important to train Jordanian workers to meet the challenges of future tourism development not only in Jordan but also in neighboring countries. Table 6.8.2 shows the training requirements at the college and vocational school levels.

Table 6.8.2 Training Requirements for Hotel Industry

	2000	2010
Total Number of Trained Staff Required (1)	6,000	15,200
Annual Average Required/to meet the Above Target	1,200	1,600
College Level (assumed 10%)	120	160
Vocational Level (assumed 30%)	360	480

Source: JICA Study Team

(1) Includes hotel management and staff

Approximately 6,000 people will be required by the year 2000 and 15,200 by the year 2010 or 1,200 and 1,600 people per year respectively. It is assumed that 10% of these people would be trained at colleges and universities and 30% at vocational schools and the remaining 60% would be trained on the job for the domestic hotel industry. However, if skilled workers continue to migrate out of Jordan, then perhaps the required number for training at college and vocational school levels should be doubled. Amman is becoming a center for higher education in the region.

(4) Strategy for Human Resource Development

a. Reorganization of the Hotel Training College in Amman

The Hotel Training College in Amman faces serious problems in the quality of teachers which is below standard due to very low salaries and the caliber of students is also poor. Quality teaching staffs and good management are the keys to successful human resources development. Therefore in line with the government policy to transfer the management responsibility to MOTA from the Ministry of Higher Education and Ministry of Education, full participation of the private sector such as the Jordan Hotel Association is recommended to allow flexibility in recruiting quality teaching staffs. Also it may be worthwhile to consider obtaining a college franchise from a world-renown hotel school.

b. Encourage Private Sector to Invest in Human Resource Development of Tourism Industry

The government should encourage the private sector to enter the manpower development market as a commercial business by offering attractive incentives such as concessional loans and tax reductions and/or exemptions. The private sector should provide better facilities and provide more market-oriented training to satisfy the needs of the industry.

If higher salaries are secured for graduate students, then the students may agree to pay higher tuition fees. Scholarship arrangement may be effective to attract high caliber students to the industry. MOTA should be instrumental in establishing a scholarship fund which will be raised by contribution of the private sector together with the concessional loan from external funding agencies. Such schools teaching cooking for hotels and restaurants, language for interpreters, and travel industry for tour guides and travel service providers would be successfully run by the private sector.

c. Assist Local Artisans Engaged in Souvenir Production for Their Skill Development

Films and tapes record people, scenery and events of the places visited by tourists and tell their families and friends about the pleasure they experienced. Souvenir that has identification of the places of visits has the same effect as films and tapes have and motivate people to visit. In this sense souvenir can be a key element of a tourism product.

Also a skill to produce souvenirs demonstrated at a workshop of local artisans can

be a tourist attraction as witnessed in the successful operation of the Khan Zaman. Good souvenirs can be produced by a cottage industry operated by family members during off-agricultural season. These activities should be encouraged not only for tourism promotion but also for development of local economy where women can play major roles.

It requires various skills and knowledge such as merchandising, production, financing and marketing to promote souvenir industry. For the purpose the current approach by the VTC alone is not sufficient. Concerted effort of the concerned agencies such as MOTA, MOIT, MMRAE, IDB and Chambers of Industry and Commerce should be extended to local artisans by defining the role of each agency. Introduction of industrial extension services to each locality by AV assisted mobile training facility may be one option for effective skill development through the kingdom rather than asking local artisans to gather in the regional or central training facilities.

d.   Development of Museum Professionals and Staffs

Several museums of different category and location are proposed in this study. Key to the successful operation of these museums will depend on availability of quality professionals and staff to excavate, select, present, conserve and guide the exhibits. The two universities, i.e., the Jordan University and the Yarmouk University have made significant achievements in the archeological studies in the Kingdom as well as the Middle East. Therefore it is recommended to enhance the departments of the two universities to meet the requirements of the professionals and staff for museums of the Kingdom as well as of the region. For specific policy formulation in this regard, a coordination among MOHE, MOTA, MOC and MOIT will be needed.

6.9 Environmental Management

(1) Main Issues

- Several environmental issues directly affect the tourism resource: desertification, loss of biodiversity, social disruption, degradation of landscape. Tourism development will depend on the conservation of natural/cultural resources. Environmental quality is a resource for tourism, and tourism can provide benefits for the conservation and upgrading of the environment.

- Because of its limited size and the sensitivity of environment, Jordan has limited carrying capacity for tourism development. It is essential to take into account this constraint of carrying capacity when developing sustainable tourism.

- The legislation for protecting the natural environment is very weak. The only law related to this issue is the hunting law. There are several agencies involved in environmental protection, including DOE, Forestry Department, RSCN, and MOTA. However, the only agency is able to implement protection of nature is an NGO, the RSCN. There is an urgent need to carry out nature protection laws, and to define appropriate institutions (national/regional parks, nature reserves).

- Natural sites are not managed in a sustainable way because of several deficiencies, such as the absence of nature protection regulations and enforcement agencies, the lack of human and financial resources, and the weakness to carry out land use policies and plans.

- In the absence of legislation, multimanagement of tourism sites seems to be a realistic alternative. RSCN is already gaining experience in the development of protection measures including ecotourism (Dana reserve). The coordination of MOTA with this agency, and those already mentioned above, seems essential for appropriate development.

- However, coordination should be improved. Dibbin Forest National Park is an example of the lack of coordination: Forest site (Forestry Department) and visitors facility (MOTA, delegated to private management) are the components of the amenity. Litter is widely scattered in the forest. This is largely due to the lack of appropriate coordination between forest resource maintenance and tourist activity management. This kind of situation provides a disamenity.

- MOTA has already developed the Terms of Reference for EIAs of tourism projects. Together with EIA guidelines in the tourism sector, this TOR should receive the agreement of the General Environment Corporation. MOTA must take

measures to make sure that EIAs of projects are implemented according to this TOR and eventually guidelines. The General Environment Corporation should be the supervising agency of EIA studies.

- MOTA has not been registered as a member of the High Council of the Environment Protection. The absence of MOTA from this council should be rectified urgently, since tourism development cannot be considered without strong environmental conservation and protection. The environment unit of MOTA should be strengthened, and should immediately commence work on ecotourism policy and promotion in relation with tourism development projects.

- Other important aspects are landscape resource development (protection and management of landscape in coordination with antiquity sites, landscaping of accesses).

- Ecotourism is almost non-existent in Jordan, in spite of its potential from the standpoint of availability of nature resources. It is a valuable tourism product, also for long term. Ecotourism allows diversification of tourism sites, and dispersion of visitors. It is suited to the limited carrying capacity of Jordan's tourism/environment resources. It should be an essential piece of the sustainable tourism development strategy. MOTA should develop guidelines for ecotourism development, to be taken into consideration within the framework of EIA.

(2) Measures for Sustainable Tourism Strategy

The expected role of tourism in environmental protection and conservation in Jordan can be summarized as follows:
- Increase the environmental quality of sites which are degraded by existing pressures (non-organized tourism activity, uncontrolled grazing);
- Promote the use of new technologies through pilot projects;
- Generate revenues for the conservation of nature and culture;
- Develop and preserve attitudes of natural and cultural patrimony; and
- Identify and protect the nature tourism potential.

Main measures to meet the defined targets are described below, with a summary in Table 6.9.1.

Table 6.9.1 Review of Measures for Sustainable Tourism Strategy

	Measures	Regional
Target 1: Conservation of the Natural and Cultural Heritage	Upgrading of current wildlife legislation; law for the creation and management of protected areas; Regulatory and institutional building for nature conservation areas and nature parks; Designation of natural parks (national or regional) for areas of natural interest; Conservation, restoration and development of environment as a tourism resource, and designation of sites of interest as natural/cultural patrimony; Financial and technical aid to leading environmental NGOs like RSCN and JES; Research programs on wildlife and rural society; Physical marking of limits of nature reserves;	Need of EIA guidelines and procedures with agreement of General Environment Corporation for the rift valley (area under jurisdiction of JVA); Aqaba region has also EIA procedure; Initiate environmental planning for Petra, Aqaba, Shawbak, Dead Sea, and Amman; Designation of sites of interest to start with nature reserves and old villages; Consider the designation of Wadi Ram as a national park; and Dead Sea as a national or regional park;
Target 2: Identification and Development of the Nature Tourism Potential	Identification, protection, development of nature tourism potential; Wildlife surveys to identify the ecological value; Social surveys to identify the land use pattern and its effects on nature; Priorities for nature conservation, with ecological zoning; Discussion with local communities to find out needs and acceptability of tourism; Establishment of land use plan; Development of control and monitoring systems.	The areas of natural interest, which means those with nature tourism potential, have been temptatively defined in this study (Volume 2); they are: Dead Sea with (South) Escarpment; Wadi Araba; Southern Highlands (with Dana, Petra); Hisma (with Wadi Ram); Azraq oasis; Burq / Badia; Gulf of Aqaba.

	Measures	Regional
Target 3: Development of Sustainable Tourism	Programs of rehabilitation and development of existing sites; Project units should be designated within the MOTA for each important project site in order to develop integrated management; EIA of tourism project; approval process of EIA should be clarified and involve the General Environment Corporation as the approval agency; Development of EIA guidelines for specific regions; Coordination between tourism development actors, host community, and environmental agencies; coordination with RSCN, JVA, AQA, and other line agencies; Collection of entrance fees in designated sites, creation of job opportunities; Development of environmental awareness / environmental education; Development of environmentally friendly facilities and products; Linking tourism development and nature protection with local communities; Land use plans; Information and monitoring;	Conservation measures are being developed by RSCN in Dana, and considered for Wadi Araba, Wadi Mujib, and Burq; a pilot project could be defined for Shawbak, which is an example of nature and culture heritage; The Dead Sea project at Zarqa Ma'in, defined in Part II, should be a pilot project for measures like environmentally friendly development of environmental education (museum), and coordination with picnickers activity; also Wadi Ram and Dana;

PART I (VOLUME 1)

NATIONAL TOURISM DEVELOPMENT STRATEGY AND POLICY

(TOURISM DEVELOPMENT)

Chapter 7.

National Tourism Development Policy

Chapter 7.   National Tourism Development Policy

7.1   Development Framework

7.1.1 Strategic Options and Spatial Distribution

In the preceding Chapter optimum strategies for tourism development in Jordan were identified and recommended. The formation and tourism cores and corridors is recommended with the immediate priority for Amman and its environs including the Dead Sea area.

The Jordan Valley Authority's Dead Sea East Coast Development Study calls for the creation of 4,000 beds between 2000 and 2005, and another 8,000 beds between 2005 and 2010. The Study concluded the area could attract 170,000 tourists in the medium term and 515,000 tourists by 2010.

The Aqaba Regional Authority's Aqaba Development Master plan anticipates 3,000 hotel rooms by 2000 and 6,000 rooms by 2010.

Applications for development in the Dead Sea area and the Aqaba area by the private sector have started to come. However, for both areas the total of the numbers of rooms specified in the applications has yet to reach nowhere near the targets specified in the two plans.

The private sector seems to have indicated through their actions where their immediate effort should be concentrated. Table 7.1.1 shows hotel applications submitted to MOTA in 1995. More than 90 percent of the proposed hotel rooms (1,453 out of 1,604) are to be built in the Amman area.

The Dead Sea area and Aqaba will become secondary tourist cores after Amman as they are to be built up over time. The concept of the staged development in terms of contents and spatial distribution has been explained in the preceding Chapter 6, sections 6.3 and 6.4. In the following section 7.2 the concept is described in more detail.

The tourism projections for each of the tourism areas in Jordan were carried out following the spatial distribution policy described in section 7.2.

Table 7.1.1 Applied Hotel Projects in 1995

Commercial Name	Expected Classification	No. of rooms		No. of beds		No. of employees		Location
Grand Hayatt	* * * * *	313		626		376		Amman
Sheraton	* * * * *	302		604		362		Amman
Hilton	* * * * *	250		500		300		Amman
Al Sharq for Tourism Projects	* * * *	200		400		160		Amman
Four Points	* * *	170		340		102		Amman
Mount Nebo	* * *	46		92		27		Amman
Carlton Hotel Suites	* * *	69		138		41		Amman
Hayatt Amman Hotel Suites	* *	37		74		15		Amman
Mr. Al Sa'ed	* * *	—		—		—		Amman
Jordan Trade Facilities Co.	* *	30		60		12		Amman
Hamorabi	*	20		40		5		Amman
Amman Palace[1]	*	16		32		4		Amman
Amman Total		1,453	(90.5%)	2,906	(90.5%)	1,404	(93.8%)	
Rawabi Zai	* * * *	90		180		72		Zai (Balqa)
The Siq	*	21		42		5		Aqaba
Mr. Abu A-Feelat	* *	40		80		16		Karak
Other Total		151	(9.5%)	302	(9.5%)	93	(6.2%)	
Grand Total		1,604	Rooms	3,208	Beds	1,497	Employees	

1) Granted a soft opening

Amman 0.96 employees/room,	Other 0.61 employees/room,	Average 0.93 employees/room
Amman 0.48 employees/bed,	Other 0.31 employees/bed,	Average 0.47 employees/bed

Source: MOTA

7.1.2 Demand Projections by Area

Projections for tourist arrivals (as opposed to total frontier arrivals) for Jordan as a whole are presented in Chapter 3, section 3.4 for the three cases of Scenario A, Scenario B, and Scenario C, which correspond to low, medium and high tourism development cases.

In order to examine the effect of tourist arrivals at each of the tourism areas, the number of tourist arrivals was converted into the number of tourist-nights by means of the average length of stay. Estimation of the required number of beds per day was then carried out. Assumptions on average length of stay and others are shown in Table 7.1.2.

The national total of tourist-nights was distributed among the tourism areas depending on the shares of each area to the national total, which were estimated in line with the proposed spatial distribution policy.

The distribution of tourist-nights by Tourism Region was done considering the following:

(i) **Northern Tourism Region**
The share of tourist-nights in the Northern Tourism Region (Irbid, Ajlun-Jerash Tourism Areas) would decrease toward 2010 due to development of the other tourist sites such as the Dead Sea and Amman areas. This region could also become a day-trip area from Amman with future infrastructure development in the region.

(ii) **Eastern Tourism Region**
The Eastern Tourism Region's (Mafraq-Zarqa Tourism Area) share will decrease gradually due to the lower potential of tourist attractions and activities in the Region compared with the other tourism areas, and the region would become a day-trip area from Amman, similar to the Northern Tourism Region.

(iii) **Central Tourism Region**
The share of the Central Tourism Region (Amman Tourism Area) would decrease toward 2010 due to the diversification of tourist attractions and activities including the development of accommodation facilities at other tourists sites.

(iv) **Western Tourism Region**
The share of the Western Tourism Region (Balqa, Madaba-Dead Sea and

Karak-Dead Sea Tourism Areas) is, in general, expected to grow by 2000 and to continue expanding to 2010 because of an increase in tourist attractions and activities in these areas. The Karak-Dead Sea Tourism Area could increase its share slightly in the case of Scenarios B and C. The share of this Tourism Region was increased from 4.0% in 1995 to 16.5% in 2010 in the case of the most accelerated tourism development, Scenario C.

(v) Southern Tourism Region

The share of Southern Tourism Region (Tafila, Petra-Shawbak and Aqaba-Wadi Ram Tourism Areas) is between 33.7% to 35.0% of the total tourist-nights of the country by 2010 in three scenarios. Tafila Tourism Area could reduce its share. The shares of Petra-Shawbak and Aqaba-Wadi Ram Tourism Areas can keep the same share level by 2010 at the three scenarios.

The assumptions on tourist-nights share, length of stay and average bed occupancy rate by tourist areas are set out at Table 7.1.2. The shares of tourist-nights at the Amman, Balqa, Madaba - Dead Sea and Karak - Dead Sea Tourism Areas are, in general, expected to grow by 2000 and to continue this expansion to 2010 because of increasing tourists attractions and activities in these areas. The Amman Tourism Area is the gateway for Jordan Tourism and Center of tourist accommodation in Jordan. Balqa Tourism Area holds the resources of Salt, Jordan Valley and Dead Sea, and it is considered part of the tourism destination. The Madaba-Dead Sea Tourism Area is rich in a variety of attractions for tourists. Development of access roads will emphasize the attractions of such tourist attractions. The Karak- Dead Sea Tourism Area is at present an intermediate location between Amman and Petra. The Wadi Mujib, Karak Castle and Dead Sea areas can be more attractive in the future due to development efforts. Assumed shares of each area to the total tourist-nights and other assumptions needed for the estimation of required tourist-beds in each area are shown in Table 7.1.3. Tables 7.1.4 through 7.1.5 present the projections of required beds in 2000 and 2010 for each of the three scenarios.

Table 7.1.2 Accommodation Arrivals and Bed Requirements in 2000, 2005 and 2010 by Three Development Scenarios

	1995	Scenario A			Scenario B			Scenario C		
		2000	2005	2010	2000	2005	2010	2000	2005	2010
(A) Accommodation Arrivals ('000)	1,155	1,474	1,837	2,182	1,546	1,973	2,400	1,620	2,168	2,767
(B) Average Length of Stay	3.5	3.5	3.5	3.5	3.5	3.5	3.5	3.5	3.5	3.5
(C) Tourist-nights ('000)	4,043	5,159	6,430	7,637	5,411	6,906	8,400	5,670	7,588	9,685
(D) Average Bed Occupancy Rate	45%	50%	55%	55%	50%	55%	55%	50%	55%	55%
(E) Equivalent Bed Requirement per Day	24,612	28,268	32,027	38,042	29,649	34,399	41,843	31,068	37,798	48,242

Note on Assumptions:
- Samples of 'Average Length of Stay' of foreigners are 3.9 days in Israel, Turkey:3.5days, Tunisia:3.9,Egypt:7.3days, Syria: 1.2days in 1991. Jordan by Pachage Tours is 4.84, 4.44 and 3.75 days in 1993,1994 and 1995, respectively.

Source: JICA Study Team

Table 7.1.3 Assumption of Tourist-nights Share, Length of Stay and Average Bed Occupancy Rate in 1995, 2000 and 2010 by Develo·ment Scenario (1/2)

	1995			2000-Scenario A			2000-Scenario B			2000- Scenario C		
	Tourist-nights Share(%)	Length of Stay	Ave. Bed Occup.(%)	Tourist-nights Share(%)	Length of Stay	Ave. Bed Occup.(%)	Tourist-nights Share(%)	Length of Stay	Ave. Bed Occup.(%)	Tourist-nights Share(%)	Length of Stay	Ave. Bed Occup.(%)
Northern Tourism Region	3.0%	1.0	30%	3.0%	1.0	45%	3.0%	1.0	45%	3.0%	1.0	45%
Irbid Tourism Area	1.0%	1.0		1.0%	1.0	45%	1.0%	1.0	45%	1.0%	1.0	45%
Ajlun-Jerash T.A.	2.0%	1.0		2.0%	1.0	45%	2.0%	1.0	45%	2.0%	1.0	45%
Eastern Tourism Region	2.0%	1.0	30%	1.0%	1.0	40%	1.0%	1.0	40%	1.0%	1.0	40%
Mafraq-Zarqa Trm. A.	2.0%	1.0		1.0%	1.0	40%	1.0%	1.0	40%	1.0%	1.0	40%
Central Tourism Region	57.0%	3.0	48%	54.0%	3.0	55%	54.0%	3.0	55%	54.0%	3.0	55%
Amman	57.0%	3.0		54.0%	3.0	55%	54.0%	3.0	55%	54.0%	3.0	55%
Western Tourism Region	4.0%	1.2	30%	7.0%	1.2	50%	7.0%	1.2	50%	7.0%	1.2	50%
Balqa Tourism Area	0.5%	1.0		0.5%	1.0	50%	0.5%	1.0	50%	0.5%	1.0	50%
Madaba-Dead Sea T.A.	2.0%	1.5		5.0%	1.5	50%	5.0%	1.5	50%	5.0%	1.5	50%
Karak-Dead Sea T.A.	1.5%	1.0		1.5%	1.0	50%	1.5%	1.0	50%	1.5%	1.0	50%
Southern Tourism Region	34.0%	1.9	43%	35.0%	1.9	45%	35.0%	1.9	45%	35.0%	1.9	45%
Tafila Tourism Area	0.5%	1.0		0.5%	1.0	40%	0.5%	1.0	40%	0.5%	1.0	40%
Petra-Shawbak T. Area	15.0%	2.0	43%	16.5%	2.0	45%	16.5%	2.0	45%	16.5%	2.0	45%
Aqaba-Wadi Ram T.A.	18.5%	2.0	43%	18.0%	2.0	45%	18.0%	2.0	45%	18.0%	2.0	45%
	100.0%			100.0%			100.0%			100.0%		
	'95 Assumed Tourist-nights : 4,043,000			2000 Tourist-nights : 5,159,000			2000 Tourist-nights : 5,411,000			2000 Tourist-nights : 5,670,000		

Source: JICA Study Team

Table 7.1.3 Assumption of Tourist-nights Share, Length of Stay and Average Bed Occupancy Rate in 1995, 2000 and 2010 by Development Scenario (2/2)

	2010-Scenario A			2010-Scenario B			2010-Scenario C		
	Tourist-nights Share(%)	Length of Stay(%)	Ave. Bed Occup.(%)	Tourist-nights Share(%)	Length of Stay(%)	Ave. Bed Occup.(%)	Tourist-nights Share(%)	Length of Stay(%)	Ave. Bed Occup.(%)
Northern Tourism Region	3.0%			2.0%			1.6%	1.0	45.0%
Irbid Tourism Area	1.0%	1.0	45.0%	0.8%	1.0	45.0%	0.6%	1.0	45.0%
Ajlun-Jerash T.A.	2.0%	1.0	45.0%	1.2%	1.0	45.0%	1.0%	1.0	45.0%
Eastern Tourism Region	1.0%			0.5%			0.2%	1.0	30.0%
Mafraq-Zarqa Trm.A.	1.0%	1.0	30.0%	0.5%	1.0	30.0%	0.2%	1.0	30.0%
Central Tourism Region	53.0%	3.0	60.0%	51.5%	3.0	60.0%	48.0%	3.0	60.0%
Amman	53.0%	3.0	60.0%	51.5%	3.0	60.0%	48.0%	3.0	60.0%
Western Tourism Region	8.0%	1.5	55.0%	11.7%	1.5	55.0%	16.5%	1.5	55.0%
Balqa Tourism Area	1.0%	1.0	45.0%	1.0%	1.0	45.0%	1.5%	1.0	45.0%
Madaba-Dead Sea T.A.	5.5%	2.0	55.0%	9.0%	2.0	55.0%	13.0%	2.0	55.0%
Karak-Dead Sea T.A.	1.5%	1.0	55.0%	1.7%	2.0	55.0%	2.0%	1.0	55.0%
Southern Tourism Region	35.0%	2.0	55.0%	34.3%	2.0	55.0%	33.7%	2.0	55.0%
Tafila Tourism Area	0.5%	1.0	40.0%	0.3%	1.0	40.0%	0.2%	1.0	40.0%
Petra-Shawbak T.Area	16.5%	2.0	60.0%	16.5%	2.0	60.0%	16.0%	2.0	60.0%
Aqaba-Wadi Ram T.A.	18.0%	2.0	55.0%	17.5%	2.0	55.0%	17.5%	2.0	55.0%
	100.0%			100.0%			100.0%		
	2010-(A) Tourist-nights : 7,637,000			2010-(B) Tourist-nights : 8,400,000			2010-(C) Tourist-nights : 9,685,000		

Source: JICA Study Team

Table 7.1.4 Distribution of Tourist-nights, Tourists and Room Requirement in 2000 by Development Scenario B

2000 Scenario B

A	B Tourist-nights Share by Tour Area(%)	C No. of Tourist-nights per year('000)	D Average Length of Stay(Night)	E Number of Tourists per year('000)	F Average Bed Occupancy Rate(%)-yearly	F Average Room Occupancy (Person)-yearly	G No. of Room Required in 2000	H Number of Bed Required (units)
Northern Tourism Region	3.6%	162	1.0	162	45%	1.7	581	988
Irbid Tourism Area	1.6%	54	1.0	54	45%	1.7	194	329
Ajlun-Jerash T.A.	2.0%	108	1.0	108	45%	1.7	388	659
Eastern Tourism Region	1.0%	54	1.0	54	40%	1.7	218	371
Mafraq-Zarqa Trm A.	1.0%	54	1.0	54	40%	1.7	218	371
Central Tourism Region	54.0%	2,922	3.0	974	55%	1.5	9,703	14,555
Amman	54.0%	2,922	3.0	974	55%	1.5	9,703	14,555
Western Tourism Region	7.0%	379	1.2	289	50%	1.7	1,221	2,075
Balqa Tourism Area	0.5%	27	1.0	27	50%	1.7	87	148
Madaba-Dead Sea T.A	5.0%	271	1.5	180	50%	1.7	872	1,482
Karak-Dead Sea T.A.	1.5%	81	1.0	81	50%	1.7	262	445
Southern Tourism Region	35.0%	1,894	1.9	960	45%	1.8	6,423	11,551
Tafila Tourism Area	0.5%	27	1.0	27	40%	1.7	109	185
Petra-Shawbak T.A.	16.5%	893	2.0	446	45%	1.8	3,020	5,436
Aqaba-Wadi Ram T.A.	18.0%	974	2.0	487	45%	1.8	3,294	5,930
	100.0%	5,411			48%	1.7	18,147	29,540

Source: JICA Study Team

Table 7.1.5 Distribution of Tourist-nights, Tourists and Room Requirement in 2010 by Development Scenario B

2010 Scenario B

A	B Tourist-nights Share by Tour Area(%)	C No. of Tourist-nights per year('000)	D Average Length of Stay(Night)	E Number of Tourists per year('000)	F Average Bed Occupancy Rate(%)-yearly	F Average Room Occupancy (Person)-yearly	G No. of Room Required in 2010	H Number of Bed Required (units)
Northern Tourism Region	2.0%	168	1.0	168	45.0%	1.7	602	1,023
Irbid Tourism Area	0.8%	67	1.0	67	45.0%	1.7	241	409
Ajlun-Jerash T.A.	1.2%	101	1.0	101	45.0%	1.7	361	614
Eastern Tourism Region	0.5%	42	1.0	42	30.0%	1.7	226	384
Mafraq-Zarqa Trm A.	0.5%	42	1.0	42	30.0%	1.7	226	384
Central Tourism Region	51.5%	4,326	3.0	1,442	60.0%	1.7	11,620	19,753
Amman	51.5%	4,326	3.0	1,442	60.0%	1.7	11,620	19,753
Western Tourism Region	11.7%	983	1.5	533	55.0%	1.8	2,788	4,989
Balqa Tourism Area	1.0%	84	1.0	84	45.0%	1.7	301	511
Madaba-Dead Sea T.A.	9.0%	756	2.0	378	55.0%	1.8	2,092	3,766
Karak-Dead Sea T.A.	1.7%	143	2.0	71	55.0%	1.8	395	711
Southern Tourism Region	34.3%	2,881	2.0	1,453	55.0%	1.8	7,686	13,824
Tafila Tourism Area	0.3%	25	1.0	25	40.0%	1.7	102	173
Petra-Shawbak T.A.	16.5%	1,386	2.0	693	60.0%	1.8	3,516	6,329
Aqaba-Wadi Ram T.A.	17.5%	1,470	2.0	735	55.0%	1.8	4,068	7,323
	100.0%	8,400			56%	1.8	21,921	39,972

Source: JICA Study Team

7.2 Spatial Development Policy

7.2.1 Tourism Sites and Facilities

Figure 7.2.1 shows the number of non-Arab visitors to major tourist sites in 1994 as recorded by MOTA. Petra and Jerash were (and still are) the dominant destinations, with the number of visitors to other sites much less despite the large number of other sites as shown in the Figure 4.1.1. Reflecting the concentration of visitors in a few sites, places for the accommodation of tourists are concentrated in Amman, Aqaba, and Petra as shown in same Figure 7.2.1. A comparison of the two figures reveals the relative weakness of Amman, where tourism resources are not sufficiently exploited. Amman needs strengthening.

In terms of tourism resource development and management, Jordan could be divided into three greater tourism zones, i.e., the Northern, the Central, and the Southern zones.

Amman should become a strong international gateway/tourism core of the Central Greater Tourism Zone and serve as the base for various tours of the surrounding tourism resources, which will be formulated to cater to the different tastes of customers; Amman itself should also serve as a center for urban tourism. The Dead Sea Area should become another core in its own right with a resort character, serving various sites in the Central Greater Tourism Zone. Various tourism facilities would be developed within the Zone with visitors to come from the bases of Amman and the Dead Sea. Prepared tourist sites and facilities will become so numerous and tour routes complex that one has to consider activities within this Zone not as the agglomeration of isolated points but as an area. The character of the Zone will be primarily urban with day tours to points of interest.

The Southern Greater Tourism Zone contains the "Golden Triangle" of Petra, Wadi Ram, and Aqaba. Aqaba will serve as the country's second international gateway/tourism core and Petra will be a minor core. The character of this Zone will be more "wonder"-oriented, with both natural and historic sites.

The Northern Greater Tourism Zone will serve a niche market, catering to tourists visiting the Central Zone as well as tourists coming from across the Israeli and Syrian borders.

The Eastern Tourism Region beyond Azraq is of little attraction to the international tourist market, except for a marginal specialist segment of scholars, archaeologists, and enthusiasts. The area deserves investments concomitant to the small size of the subject market. Desert castles in and around the Azraq area fall within one-day

optional tour circuit from Amman.

In the short term (1996-2000), emphasis should be placed on making the Amman Greater Tourism Zone a truly internationally competitive destination. The Dead Sea Area should be developed insofar as it complements Amman. Aqaba will require improvements and expansion but it can be developed according to market response. Figure 7.2.2 illustrates this short-term spatial development policy.

In the mid to long term (2000-2010 and beyond), Aqaba should become a secondary gateway/core and Petra and Dead Sea should become a tertiary core with tour programs centering around them. Amman should be further improved. Figure 7.2.3 illustrates the spatial development policy for 2010 and beyond.

7.2.2 Supporting Structure

Figure 7.2.2 also shows the existing road network supporting the tourist flows. The desert highway is the primary connector linking the tourism bases of Amman, Petra, and Aqaba. Other roads are used as access links to particular tourism resources. However, the future transport network will become more like the one shown in Figure 7.2.4. The relative importance of Great Rift Valley Highway and Kings' Highway will increase. Thus, there will be three north-south highways serving tourists with facilities along each of them.

Figure 7.2.5 illustrates the estimated required number of hotel rooms in various places in terms of the number of required hotel rooms to be added each year.

Water supply, sewerage, drainage, and waste management systems should be planned and provided in line with the expected increase in hotel room supply.

Figure 7.2.1 Non-Arab Visitors and Package Tour Tourist-nights

Jerash Archaeological Site (109)

Amman Archaeological Museum (39)

Amman Folklore Museum (6)

Amman (246)

Karak Castle (37)

Petra Archaeological Site (163)

Petra (73)

Wadi Ram Visitor Center (46)

All Other Places (11)

Aqaba (108)

Number of Tourist Bed-Nights of Package Tour
(*thousand in 1993)

Number of Non-Arab Visitors to Tourist Site
(*thousand in 1994)

Mediterranean

Dead Sea

Figure 7.2.1 Non-Arab Visitors and Package Tour Tourist-nights

Mediterranean

Jerash Archaeological Site (109)

Amman Archaeological Museum (39)

Amman Folklore Museum (6)

Amman (246)

Dead Sea

Karak Castle (37)

Petra Archaeological Site (163)

Petra (73)

Wadi Ram Visitor Center (46)

All Other Places (11)

Aqaba (108)

Red Sea

Number of Tourist Bed-Nights of Package Tour
(*thousand in 1993)

Number of Non-Arab Visitors to Tourist Site
(*thousand in 1994)

Figure 7.2.2 Spatial Development in Short Term (by 2000)

Tourism Structure

Tourism Core and its Zone

Tourism Corridor

Major Tourism Infrastructure

Ⓐ	○	Airport
Ⓑ	◉	Border Crossing
Ⓟ		Port
		Road Network
		Railway

Development & Management

	Established		Potential	
Archaeology	▼		▽	
History / Culture	▣		▢	
Scenic Wonder / Nature	▲		△	
Holiday Activity	●		○	

Figure 7.2.2 Spatial Development in Short Term (by 2000)

SYRIA

Mediterranean

Irbid

Mafraq

Ajlun
Jerash

Zalqa

Salt
Amman

Azraq

Jerusalem

Madaba

Dead Sea

ISRAEL

Karak

Tafila

Tourism Structure

Tourism Core
and its Zone

Tourism Corridor

Major Tourism Infrastructure

Petra

○	○	Airport
⊕	⊕	Border Crossing
℗		Port
-----		Road Network
....		Railway

Ma'an

EGYPT

Development & Management

Established	Potential	
▼	▽	Archaeology
		History / Culture
▲	△	Scenic Wonder / Nature
○	○	Holiday Activity

Eilat
Aqaba
Wadi Ram

Red Sea

SAUDI ARABIA

Figure 7.2.3 Spatial Development in Mid/Long Term (Beyond 2010)

Figure 7.2.3 Spatial Development in Mid/Long Term (Beyond 2010)
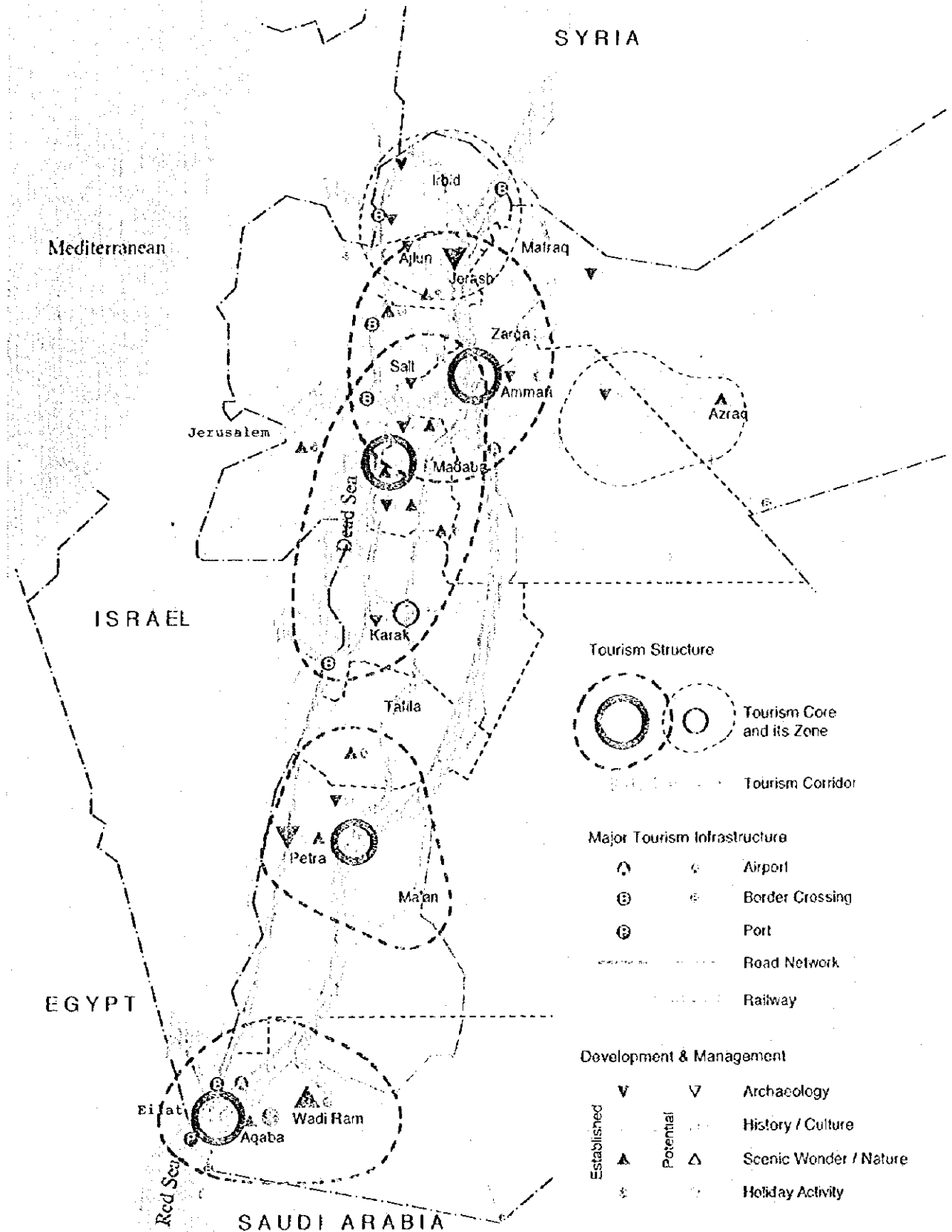
SYRIA

Mediterranean

Irbid

Ajlun

Jerash

Mafraq

Zarqa

Salt

Amman

Azraq

Jerusalem

Dead Sea

Madaba

ISRAEL

Karak

Tafila

EGYPT

Petra

Ma'an

Eilat

Wadi Ram

Aqaba

Red Sea

SAUDI ARABIA

Tourism Structure

Tourism Core
and its Zone

Tourism Corridor

Major Tourism Infrastructure

○			Airport
Ⓑ			Border Crossing
Ⓟ			Port
			Road Network
			Railway

Development & Management

Established		Potential		
▼		▽		Archaeology
				History / Culture
▲		△		Scenic Wonder / Nature
				Holiday Activity

7.3 Marketing and Promotion

7.3.1 Product Development

(1) Objectives

The objectives of the tourism development strategy as they relate to product development are as follows:

- to upgrade existing tourist attractions and products in order to cope with the changing desires and needs of today's tourists; and
- to develop new attractions and products and diversify the product line in order to enhance the destination profile of Jordan in the world market.

(2) Short Term (1995 - 2000)

This would be achieved in the short term through implementing the following measures:

- improving and upgrading major archaeological sites (Petra, Amman, Lot Cave, Jerash, Pella, Umm Qays)
- improving and upgrading visitor facilitation at major tourist sites (Petra, Dead Sea, Aqaba, Wadi Ram, Jerash, Karak, Umm Qays, Desert Castles)
- improving and upgrading Amman's urban tourism base (Stage 1 – tourist access beautification, Citadel, creation of Downtown Tourist Zone, one-stop tourist complex, establishment of National Museum)
- developing Amman International Tourism Center (World Trade Center, Conventional Hall)
- investing hotel construction in Amman
- establishing a Madaba - Main - Dead Sea circuit tour route and side attraction en route Amman - Madaba
- establishing Historic Old Salt and Jordan Valley - Dead Sea circuit tour route and side attraction en route
- partial completion of Dead Sea East Coast Development
- improving and upgrading Aqaba aqua-tourism base.
  (beach front beautification, Aqaba urban renewal, hotel and resort development)
- improving and upgrading Kings' Highway tourist corridor and historic sites (lookout/rest area along highway, Karak castle and town, Petra attractions en route)
- promoting local cultural elements such as music, dance and art
- Hijaz Railway Trip, Amman - Airport - Qatrana.

(3) Medium Term (2000 - 2010)

In the medium term the objectives would be achieved through implementing the following measures:

- improving and upgrading the Amman urban tourism base (Stage 2 - partial opening of a national museum, conference complex);
- upgrading the existing products and developing new ones (regular tourist operation of Hijaz Railway for Amman/Airport/Qatrana section, improvement of Pella archaeological site, Main Dead Sea curative product, sports and soft adventure)
- Completion of Dead Sea East Coast Development
- investing hotel construction (Amman, Aqaba).

(4) Long Term (beyond 2010)

In the long term the objectives would be achieved through implementing the following measures:

- improving and upgrading Amman's urban tourism base (Stage 3 - completion of a national museum);
- introducing new products (regular tourist train operation of Hijaz Railways for Amman/Mafraq/Syrian border with prospective continuation to Damascus, completion of Dissi soft adventure tourist core); and
- establishing new corridors and routes (completion of Great Rift Valley Highway - opening of Aqaba Drive section, side attractions en route)
- Amman - Aqaba train trip
- regular operation of Hijaz Railway tourist train to Syrian border, eventual to Damascus
- Dead Sea - Red Sea Canal Project (WB)
- developing Aqaba - Eilat Airport.

7.3.2 Information and Service Delivery

(1) Objectives

The objectives of the tourism development strategy as they relate to information and service delivery are as follow:

- to develop a new range of information service systems in order to enhance the level of tourist experience and satisfaction; and
- to develop a competent service delivery system in order to keep up with competition in the world tourist market.

(2) Short Term (1995 - 2000)

In the short term the objectives would be achieved through implementing the following measures;

- providing gateway information (production of gateway information materials, Amman tourist information center, tourist sign-posting, staff training); and
- providing on-site information (production of on-site information materials, improvement of visitor centers/museums/rest houses in Jerash, Umm Qays, Karak, Petra, Wadi Ram, new visitor center in Madaba, introduction of tourist trails and sign-posting with interpretation at major sites, staff training).

(3) Medium and Long Term (2000 - 2010 and beyond)

In the medium and long term the objectives should be achieved through implementing the following measures;

- strengthening the provision of gateway information (diverse options for holidaying in Jordan, customized suggestions for SIT market segments, production of multi-language materials - Arabic, European, Asian, staff training on language skill and cross-cultural service delivery); and
- strengthening the provision of on-site information (new visitor center in Dead Sea, introduction of audio-visual orientation programs in visitor centers, museums, rest houses at major sites, staff training on language skill and cross-cultural service delivery).

7.3.3 Marketing

(1) Objectives

The objectives of the tourism development strategy as they relate to marketing are as follows:

- to consolidate Jordan's position as tourist destination in the established tourist generating markets;
- to develop new and potential markets by monitoring and identifying changing desires and needs of market segments; and
- to hold a competitive position in the world destination market by mobilizing effective promotional measures supported with attractive proposals and products.

(2) Short Term (1995 - 2000)

In the short term the objectives would be achieved through implementing the following measures:

- strengthening the segmented approaches towards the traditional European and American markets (from the routine all-round approach across Europe to a country-by-country approach focused on growing market sources and segments, from the narrow archaeology-oriented market base to a broader culture-/curative-/holiday tourism base);
- cultivating the up-market intra-regional clientele with special focus on neighboring Arab markets (appeal of relatively lax Jordanian holiday environment) and high potential of Israeli market (reward of the peace process);
- tapping the Asian market through programmed and segmented approaches (consideration on diversity of Asian cultural backgrounds; from Shinto-Buddhist Japanese, Confucian-Taoist Chinese, Catholic Filipino, Buddhist Thai, Muslim Malay-Indonesian to Hindu Indian);
- cultivating the niche market for activity holidays (nature trek, desert experience and soft adventure - ballooning, hang-gliding, sand-bugging/skiing, rock climbing); and
- cultivating the seminar, meeting, and incentive market, initially in the intra-regional market, then on to the European market (burgeoning Italian incentive market).

(3) Medium and Long Term (2000 - 2010 and beyond)

In the medium and long term the objectives would be achieved through implementing the following measures:

- consolidating Jordan's position in the traditional European and American market through fortified business partnership with tour operators and tour organizers (clubs, associations, incentive houses, conference promoters);
- intensifying approaches to new and emerging markets (Australia, South and Central Asia, Eastern Europe);
- enhancing product profile for niche markets with diversified product line (culture, folk arts, folk life, performing arts, theme events, sports gathering and competition); and
- tapping the urban and conference tourism market (so called MICE market - Meeting, Incentive, Convention and Exhibition).

7.3.4 Promotion

(1) Objectives

The objectives of the tourism development strategy as they relate to promotion are as follows:

- to enhance the Jordanian profile and exposure as a tourist destination in the travel trade and the general public in the tourist generating countries; and
- to motivate and persuade potential tourists to visit Jordan through an efficient mix of promotional measures.

(2) Promotion Materials

a. Short Term (1995 - 2000)

In the short term the objectives would be achieved through implementing the following measures:

- producing sales tools specially geared to travel trade and organizers (tour operator sales manual, newsletter, theme tour route catalog); and

- producing motivational materials aimed for general public (example: "Jordan, Legend, History, Hospitality," "Israel, All Year Round" issued by Israel Government Tourist Office).

b. Medium and Long Term (2000 - 2010 and Beyond)

In the medium and long term the objectives would be achieved through implementing the following measures:

- producing purpose-edited sales tools geared to travel trade and organizers (incentive and conference organizer manual, newsletter for niche market); and
- producing theme motivational materials aimed for the general public (example: "Sculptured Wilderness - Touring Negev Desert," "Biblical Sites for Christian Visitors" issued by Israel Government Tourist Office).

An inventory of recommended promotional materials is summarized in Table 7.3.1 (Overseas Promotion) and Table 7.3.2 (Gateway and On-Site Information).

Promotional materials in the form of films, videos, slides and CDs will be needed later when printed materials are prepared in a proper manner as suggested here and in sufficient quantity. Materials should be prepared in various languages in the following order of priority: English, Germany, Italian, French, Hebrew, Arabic, Spanish, Japanese, Chinese and Malay.

(3) Promotional Approaches

a. Short Term (1995 - 2000)

In the short term the objectives would be achieved through implementing the following measures:

- participating in travel trade shows and fairs in major source markets;
- strengthening repeat after-sales calls to follow up the initial contact;
- keeping the buyers (tour operators/organizers) posted with updated information and products;
- organizing "fam trip" (familiarization tour) for the buyers and media;
- liaising closely with RJ to heighten the profile and exposure of Jordan in major source market; and
- exploiting new avenues for promoting Jordan in major source market (utilization of cost-saving local/resident representative service system).

b. Medium and Long Term (2000 - 2010 and Beyond)

In the medium and long term the objectives would be achieved through implementing the following measures:

- organizing joint sales mission (MOTA, RJ, hoteliers, tour operators, tourist service providers) to potential and emerging markets;
- organizing purpose-made/theme sales mission to SIT and niche markets in the established source market with attractive products and proposals (example: "Swiss Rendez-Vous" mission by Swiss Government Tourist Office);
- opening own tourist promotion office in major source market;
- organizing promotional seminar/workshop for the buyers in major source markets; and
- strengthening regional promotional tie-up (Israel , Egypt, Lebanon).

Table 7.3.1 Inventory of Recommended Overseas Promotion Materials

TITLE	CATEGORY	SIZE / FORMAT	LANGUAGE	TARGET AND CONTENT	PRI-OR-ITY
a) Jordan -Legend -History -Hospitality	General Promotion	1 sheet Four-folds 10 x 21 cm Full-color	English French Japanese	General Public. Modified content of existing JTB material e)	1
b) Jordan Tour Planner	Planning / Sales Guide for Travel Trade	A4 Full-color 30/40 pages	English Japanese	Tour Operator Model tour route, service directory (hotel, transport, travel agent), feature events, activities, etc.	2
c) Jordan -Legend -History -Hospitality	General Promotion	19 x 21 cm Full-color 8 pages	English French Japanese	General Public. Condensed edition of existing material a)	3
d) Jordan Travel Newsletter	Promotion	1 sheet Two-folds 21 x 30 cm	English Japanese	Travel Trade and Media for Publicity Monthly or Bi-Monthly	3
e) Jordan Visitor's Companion	General Promotion and Gateway Information	19 x 21 cm Cover in color, text in mono -color 20/24 pages	English French Japanese	General Public and Trade General, but more practical information (transport, hotel, dining, shopping, tourist attractions)	4
f) Jordan Travel Guide	Promotion and Gateway Information	1 sheet Four-folds 10 x 21 cm Part-color	English French Japanese	General Public and Trade Themed tour routes (antiquities, Roman ruins, Crusader castles, etc.)	5
x) Jordan - Legend - History - Hospitality	Promotion	30 x 29.5cm Full-color Designed catalog of high quality and taste	English	Ceremonial/Official Occasions and Travel Trade Shows / Fairs	x

Table 7.3.2 Inventory of Recommended Gateway and On-Site Materials

TITLE	CATEGORY	SIZE / FORMAT	LANGUAGE	TARGET AND CONTENT	PRI-OR-ITY
a) Jordan Visitor's Companion (Dual use of Promotion Material e)	Gateway Information	19 x 21 cm Cover in color, text in mono-color 20/24 pages	English French Japanese	General Public. General, but more practical information (transport, hotel, dining, shopping, tourist attractions)	1
b) Amman -Map & Guide	Gateway Information	1 sheet Four-folds 10 x 21 cm Cover-color Reverse-side mono-color	English French Japanese	General Public. Modified content of existing JTB material e). More practical information and detailed map.	2
c) 9 Site Titles -Jerash -Decapolis -Desert Castle -Mosaic -Dead Sea -Crusader Castles -Petra -Wadi Rum -Aqaba -Petra can be--	On-Site Information ------------>	1 sheet Two-folds 10 x 21 cm Mono-color Expanded 1 sheet Four-folds 10 x 21 cm	English French Italian German Japanese	General Public Concise / practical information and guide on attraction / site with practical detailed map.	2
d) Jordan Travel Guide (Dual use of Promotion Material f)	Gateway Information	1 sheet Four-folds 10 x 21 cm Part-color	English French Japanese	General Public Themed tour routes (Antiquities, Roman ruins, Crusader castles, etc. with detailed maps)	3
e) Themed Titles - Arts and Crafts - Dining/ Entertainment - Adventure/ Sports/Health Spa	Gateway Information	1 sheet Two-folds 10 x 21 cm Full-color	English French Japanese	General Public Concise introduction and motivation for souvenir purchase. Sponsored production possible. Motivation/practical information on eating-out/night-out. Sponsored production possible Motivation/practical information for Rum trek, ballooning or Ma'in health spa.	4

7.4 Tourism Industry

(1) Souvenir and Shopping

a. Objectives

The objectives of the tourism development strategy as they relate to souvenirs and shopping are as follows:

- to open up a new and lucrative avenue of tourism revenue by developing attractive and sophisticated souvenir/shopping products in order to induce tourists to spend more in Jordan; and

- to develop creative souvenir/shopping industry and related service mechanism in order to ensure a flow of new products which stimulates purchase and good service delivery which satisfies visitors.

b. Short Term (1995 - 2000)

In the short term the objectives would be achieved through implementing the following measures:

- assessing and analyzing available Jordanian souvenir/shopping items in comparison with those in the neighboring destinations (Israel, Egypt, Syria, etc.);

- forming a joint forum of public/private sectors (similar mechanism as the Jordan Tourism Board or the Jordanian Industrial Center) with participation of MOTA and Ministry of Trade/Industry in order to enhance the level of souvenir/shopping products and conduct a joint R & D for new product development;

- dispatching fact-finding missions to advanced tourist destinations (e.g. UK, Israel, etc.) to study how these countries gainfully utilize souvenir and shopping as an important source of tourist revenue; and

- establishing closer working ties with the tourist industry (hoteliers, tour and transport operators, etc.) in order to strengthen marketing opportunity of the products;

c. **Medium and Long Term (2000 - 2010 and beyond)**

- developing sophisticated one-stop souvenir/shopping complexes in major tourism cores in order to broaden the avenue for additional tourist revenue; and

- organizing an across-the-country product/design contest of souvenir/shopping items in order to encourage the initiatives of new entrepreneurs / designers and to enhance the national awareness towards the importance of souvenir/shopping in tourism activity.

7.5   Supporting Infrastructure and Services

(1)   Infrastructure

a.   Transport

Road and Road Transport

In the long term the three north-south routes of Road No. 15 (Desert Highway), Road No. 35 (Kings' Highway), and Road No. 65 (Wadi Araba Highway) should become mutually reinforcing parallel roads that support a strong north-south corridor. In terms of tourism, the three would become equally important. Ordinary industrial cargo flows should continue to be directed to use the Desert Highway, whereas tourist flows should increasingly be directed to use the last-named two. Road transport service facilities should be provided throughout the country along the major routes at scenic locations, which are abundant, combined with rest and observation facilities.

Improvements of transport terminals at gateway and other core cities should be made to serve increasingly discriminating international tourists, and the appearance of access roads to tourist sites and old but interesting city streets should be upgraded. Traffic circulation systems at each tourist site should be improved so as to avoid confusing tourists and to avoid traffic congestion.

Railways

Restoration of the historic Hijaz Railway and tourist service development of the scenic Aqaba Railway demand serious consideration by the railway corporations in association with private sector.

Water Transport

Various water transport services for tourists should be developed in the Red Sea and the Dead Sea in association with respective coastal developments. Such water transport services may include better ferry services, as well as upgraded cruise boat service in the Gulf of Aqaba and the Dead Sea.

Air Transport

Marka Airport in Amman should be improved and better utilized for domestic and regional flights. Queen Alia International Airport must be upgraded to international quality standards. Joint development of Aqaba airport with Israel deserves serious consideration.

More details on transport development policy as related to tourism development in Jordan are presented in Volume 2, Chapter 3.

b. Water Supply, Sewerage and Drainage

Water Supply

Water supply will fall short of demand around year 2000 if no action is taken, additional water from the Jordan River notwithstanding. The key to solving this problem in the medium term is to use recycled water. The distribution of various kinds of water among competing sectors, e.g., agriculture, industry, civil use, and tourism, will have to be changed from the current practice. The effect of tourism, however, will remain minimal in the overall water supply picture.

Utmost attention must be paid to the quality of water supplied to tourists as they expect the same quality as available in their home country. The nature of water supply to tourist facilities will depend on their location, however, as set out below.

Urban locations: Tourist facilities in urban areas may be supplied by the existing service provided that there is sufficient capacity. This may require an internal re-allocation of supplies in order to accommodate the projected demand. The availability of supplies should be incorporated in urban development plans and facilities should not be permitted to develop outside of areas where sufficient capacity is available.

Rural locations: Tourist facilities developed in rural areas will not normally be able to depend on the existing service and will have to develop their own dedicated supplies whether jointly funded with other planned tourism facilities or with the Jordan Water Authority. Demand and supply forecasts should be an essential element of the Environmental Impact Assessment (EIA) required before facilities are permitted to be constructed.

Sewerage

The sewerage service available for each new tourism facility will again be related to its location:

Urban locations: Large facilities should be able to connect direct to the sewerage system and will only have a minor impact on the volume of sewerage to be treated. Increased charges will contribute to the increased volumes requiring treatment.

Rural locations: Again, rural tourism is likely to place a significant load on sewerage systems where these exist. New tourism facilities should therefore be required to install and operate their own treatment facilities as part of the development cost and to include their demand and treatment forecasts within the EIA prepared for each new development. However, treatment plants should be

operated to a high standard if bad odors are to be avoided.

Drainage

The EIA for any new tourism facility should include assessment of the drainage situation after construction and should contain an implementation plan for remedial measures where needed. Municipalities and regional development authorities should examine the effect of development schemes on drainage and plan remedial measures.

Details of policies concerning water supply, sewerage, and drainage development as related to tourism development are presented in Volume 2, Chapter 4.

c. Food Hygiene and Waste Management

Food Hygiene

Training in food hygiene should be strengthened. Liaison between the Ministry of Health and MOTA, especially at the regional and local planning level, should be improved so that MOH is made aware of its future responsibilities. The level of fines should be reviewed and enforcement strengthened.

Waste Management

Different policies are necessary depending on the location of waste generation:

Urban: Increase litter bins with possible sponsorship by retailers. Municipalities should incorporate within the existing but strengthened arrangement.

Small rural: Incorporate within the existing but strengthened arrangements.

Large rural: The private sector should be responsible with a prior EIA showing implementation plans. Individual or cooperative incineration may prove practical.

Long Distance Tourist Routes: The proposed Royal Parks Society could be responsible.

Details of policies on waste management as related to tourism development are presented in Volume 2, Chapter 5.

(2) Tourism Information System

Originally in this Study, it was considered to recommend a Tourism Information Network System for MOTA. However, two system development plans have already been started jointly by MOTA and USAID. The Study Team therefore

recommends the following Tourism Information System as a possible addition to the on-going systems.

a. Management Information System

Tourism Information Management Applications for MOTA
- Reception counter service system for tourists.
- Executive information system.

Sightseeing Information Applications for Tourists
- Accommodation information system.
- Transportation information system.
- Virtual Reality Movie.

The software for these systems should be:

- flexible to allow for regular updating in response to changing conditions: and
- compatible with the MIS/TDN to installed by USAID.

The purposes of MIS are as follows:

- to support decision making especially with the rapid increase in the number of tourists after peace in the Middle East;
- to supply information management (MIS) to MOTA;
- to identify tourism trends;
- to provide real-time visual statistical tourism information;
- to upgrade the efficiency of the services provided to tourists by the MOTA;
- to explain the available attractions for tourists by using advanced graphic displays;
- to assist in the investigation and the devising of solutions to alleviate tourist-related problems; and
- to exchange information with interested organizations.

Network Configuration
The network configuration of the proposed system is shown in Figure 7.5.1.

b. Reception Counter Service System for Tourists

General Description
This 'Reception Counter Service System' will provide necessary information for MOTA staff to be given to tourists at the new Information Counters: This tourist information database will be regularly updated.

Development Targets

The Information Counters will be established gradually at the following sites:

- All Visitor Centers; and
- Tourists Information Center in Amman;

Other Considerations

Post installation modifications and adaptations will be made to accommodate various activities. Ultimately the system will interface with MOTA directly with various data sources, e.g., accommodations, tourist attractions.

c.   Executive Information System

General Description

The Executive Information System will provide tourism management information to the Ministry and MOTA management to assist in determining tourism policies. It will also include supplementary information, e.g., selected contents of the "Statistics Yearbook" displayed graphically and numerically.

Development Target

The System is planned to be installed in each MOTA office (headquarters and branch offices).

Further Considerations

Since the data will be supplied by the MIS/TDN to be installed by USAID, the type of data to be supplied must be compatible with the MIS/TDN.

The system can be undertaken by the Statistics Dept. of MOTA. The establishment of a new dedicated section within MOTA may be considered.

d.   Accommodation Information Display System and Transportation Information Display System

General Description

The purpose of this Information Display System is for tourists to be supplied with information provided at the "Reception Counter Service System" using automated touch panel type terminals. It will provide guidance in selected languages by voice.

Development Target

The machines will be installed gradually at the following places.

- All visitor centers;
- Airports (QAI Airport, Aqaba Airport); and
- JETT bus terminals;

e.   Virtual Reality Movies

General Description
Virtual Reality Movies will show a visual presentation of tourism resources by Computer Graphics (CG) with audible explanations. This will help visitors understand the History of Jordan. Earphones are recommended for voice explanation in different languages.

Development Target
Theaters capable of showing CG movies can be built at the proposed Tourist Information Center in Amman and the proposed Dead Sea Museum.

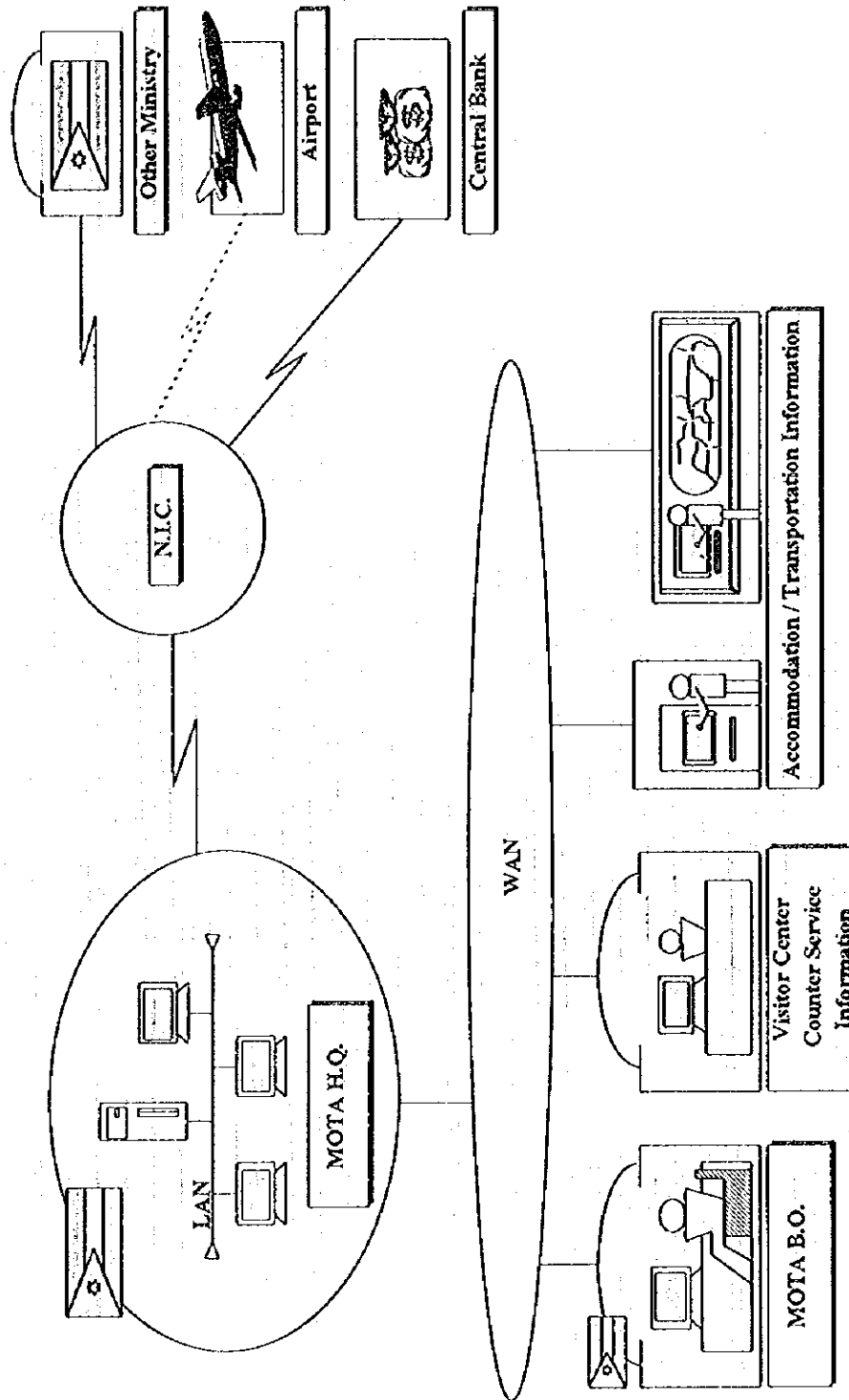#### Development Guideline and Implementation Strategies
Themes to be presented may include the following:
- Evolution of the Dead Sea,
- Historical background of tourism resources,
- Anthropological presentation of people

Themes will be that of documentary form.
Each role of CG films should take 15 to 20 minutes, and it should be shown in a dedicated room for 30 to 50 people. CG films should be updated periodically.

Figure 7.5.1 Network Configuration of Information System

Table 7.5.1 Information Systems

Area	Public Facility	Information System	Terminals
MOTA	1 MOTA H.Q.	- Accommodation / Transportation Information.	1 Terminal
	2 MOTA B.O.	- Accommodation / Transportation Information.	1 Terminal
Amman	1 Jordan Tourist Board	- Accommodation / Transportation Information.	1 Terminal
	2 Tourist Information center	- Accommodation / Transportation Information. - Counter Service Information. - Virtual Reality Movie Theater	2 Terminals 2 Terminals Cinema Theater
	3 Bus Terminal	- Accommodation / Transportation Information.	1 Terminal
	4 Amman Municipal Museum	- Accommodation / Transportation Information.	1 Terminal
	5 National Museum	- Accommodation / Transportation Information.	1 Terminal
	6 Q.A.I. Airport	- Accommodation / Transportation Information.	2 Terminals
Dead Sea	1 Museum	- Accommodation / Transportation Information. - Virtual Reality Movie Theater	1 Terminal Cinema Theater
Salt	1 Visitor center	- Accommodation / Transportation Information. - Counter Service Information.	1 Terminal 2 Terminals
Karak	1 Visitor center	- Accommodation / Transportation Information. - Counter Service Information.	1 Terminal 2 Terminals
Petra	1 Visitor center	- Accommodation / Transportation Information. - Counter Service Information.	1 Terminal 2 Terminals
Jerash	1 Visitor center	- Accommodation / Transportation Information. - Counter Service Information.	1 Terminal 2 Terminals
Wadi Ram	1 Visitor center	- Accommodation / Transportation Information. - Counter Service Information.	1 Terminal 2 Terminals
Aqaba	1 Visitor center	- Accommodation / Transportation Information. - Counter Service Information.	1 Terminal 2 Terminals
	2 Aqaba Airport	- Accommodation / Transportation Information.	1 Terminal
Border Tourist Office	1 Arava	- Accommodation / Transportation Information.	1 Terminal
	2 King Hussein Bridge	- Accommodation / Transportation Information.	1 Terminal
	3 Northern	- Accommodation / Transportation Information.	1 Terminal
	4 Ramtha	- Accommodation / Transportation Information.	1 Terminal
Israel	1 Jordan Tourist Board office in Jerusalem	- Accommodation / Transportation Information. - Counter Service Information.	1 Terminal 1 Terminal
	2 Jordan Tourist Board office in Tel Aviv	- Accommodation / Transportation Information. - Counter Service Information.	1 Terminal 1 Terminal

Source: JICA Study Team