Enhancing the Competitiveness of the Tourism Sector in Jordan: Prospects and Adaptation to New Trends

February 2020

منتدى الاستراتيجيات الأردني
JORDAN STRATEGY FORUM

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The Jordan Strategy Forum (JSF) is a not-for-profit organization, which represents a group of Jordanian private sector companies that are active in corporate and social responsibility (CSR) and in promoting Jordan's economic growth. JSF's members are active private sector institutions, who demonstrate a genuine will to be part of a dialogue on economic and social issues that concern Jordanian citizens. The Jordan Strategy Forum promotes a strong Jordanian private sector that is profitable, employs Jordanians, pays taxes and supports comprehensive economic growth in Jordan.

The JSF also offers a rare opportunity and space for the private sector to have evidence-based debate with the public sector and decision-makers with the aim to increase awareness, strengthening the future of the Jordanian economy and applying best practices.

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1. Background

In the last few years, Jordan suffered from sluggish economic growth, continued fiscal deficits and increased public debt. Yet, Jordan still strives to overcome these challenges through several measures that aim at increasing economic growth. To promote growth, Jordan needs to focus on the promising sectors that could create growth and employment opportunities. Within this context, the tourism sector is considered to be one of the most promising in Jordan. In fact, Jordan houses several special tourism sites that contribute to the country's tourism comparative advantage globally. For example, Petra, the baptism site of Jesus Christ, Wadi Rum, and many other sites that makes visiting Jordan a special touristic experience.

In recent years, the tourism sector witnessed significant growth rates that resulted in the creation of a consensus on the importance of the sector in driving economic growth. Moreover, tourism growth in Jordan is considered as a part of the growth in the sector globally where it accelerated rapidly.

Based on the above, and the positive outlook for the huge tourism potential (in the world and in Jordan), the Jordan Strategy Forum (JSF) offers a quick recap of the main issues that the tourism sector has been dwelling on over-and-over again. At the same time, with sustainability in mind, we attempt to offer some concrete directions, which we hope, may help overcome these difficulties. There is no magical solution to the sector's challenges. However, the combination of understanding, mindfulness, and openness to other countries' experiences will help us all together find the right path.

The JSF believes that Jordan must implement several structural reforms in the tourism sector and in many other organizing frameworks. To achieve the highest potentials of the sector, Jordan needs to create a smooth business environment and adapt to the technological global developments.

This paper presents the main challenges and achievements in the tourism sector in Jordan. These were identified based on a series of focus groups and interviews that were held with a diverse group of the sector's stakeholders.

International and Local Tourism Overview

According to WTTC (World Travel and Tourism Council - Travel & Tourism Economic Impact 2019), the direct contribution of travel and tourism to the World's Gross Domestic Product (GDP) in 2018 was equal to 3.2% ($2,750.7 billion). The total contribution of this sector was equal to $8,811.0 billion (10.4% of GDP). In terms of employment, in 2018, travel and tourism generated 122,891,000 direct jobs (3.8% of total employment). The total contribution of this sector was 318,811,000 jobs or 10.0% of total employment.

Indeed International tourist arrivals grew by 5 % in 2018 to reach the 1.4 billion mark. This figure was reached two years ahead of the United Nations World Tourism Organization's (UNWTO) forecast. At the same time, export earnings generated by tourism have grown to USD 1.7 trillion. This figure makes the sector a true global force for economic growth and development that drives the creation of more and better jobs and serves as a catalyst for innovation and entrepreneurship.

In short, tourism helps in improving the lives of millions, and transforms communities. Growth in international tourist arrivals and receipts continues to outpace the world economy, while emerging and advanced economies are benefiting from the resultant tourism income. For the seventh year in a row, tourism exports grew faster than merchandise exports, reducing the trade deficits in many countries.

Notwithstanding the recently witnessed strong growth rates in the travel and tourism, one might ask: What are the reasons behind such a performance? The UNWTO, in its' 2019 International Tourism Highlights Edition, states four main reasons:

a) Favorable economic environment with a positive World GDP growth.

b) Strong and continuously increasing demand for air travel.

c) Digital technologies that shape travelers' experience with artificial intelligence transforming the sector.

d) Enhanced visa facilitation with e-Visas and visas upon arrival being on the rise.

According to the Ministry of Tourism and Antiquities (MOTA), the tourism sector in Jordan was equivalent to about 12.5% of GDP (2018). This ratio is expected to increase further in 2019. The third quarter of 2019 already registered an increase in tourist arrivals by 6.5% over same quarter in 2018 (Figure 1 - including Jordanians residing abroad that are visiting their families). The Central Bank of Jordan's (CBJ) figures reveal that tourism revenues in 2019 (3rd quarter), were equal to JD 1,290.7 Million (an increase of 7.7% over same period last year). In addition, employment in tourism reached 53,389 people in Q3, 2019. However, it is worthwhile noticing that about 40% of the tourism revenue comes from Jordanians residing abroad, which explains the private sector confusion on published tourism numbers by MOTA in the media. It is necessary, therefore, to separate Jordanian and Arab visitors' numbers from other tourists when talking about tourism numbers.

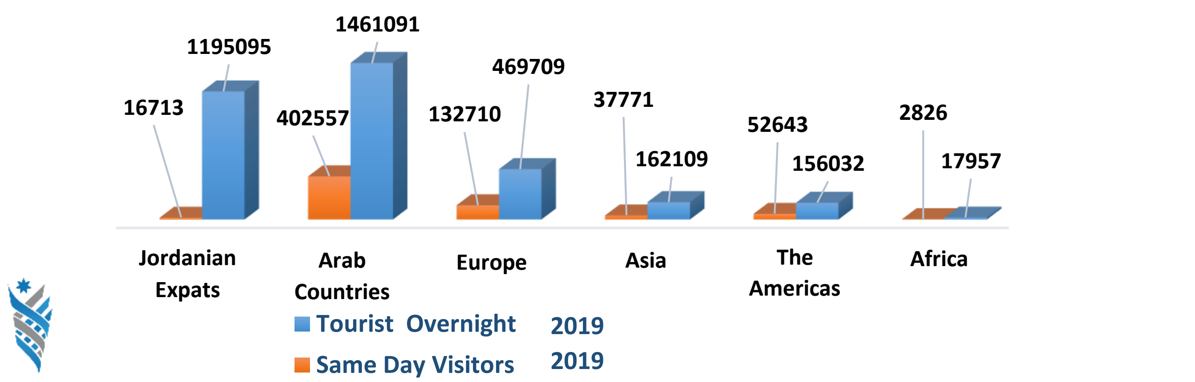

Figure 1 - Jordan Arrivals by Country Groups, January until September 2019, MOTA Statistics Q3 2019.

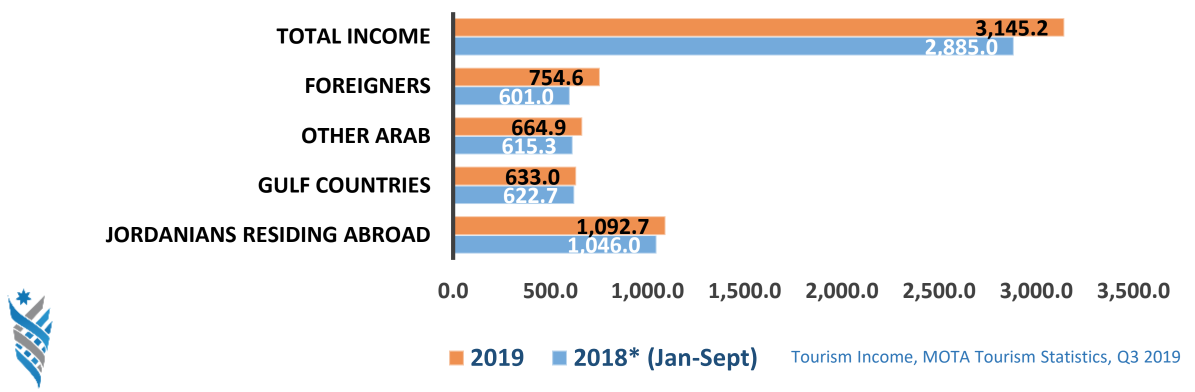

Figure 2 - Tourism Income per Country Groups (JOD Million) 2018*/2019

\In par with the country trends, the Airport International Group (AIG) registered a 5.7% increase in passenger arrivals to QAIA between January and September 2019 compared to same period in 2018 totaling 6,913,596 PAX and a 0.7% increase in aircraft movement (YTD), totaling 6,771 movements (QAIA Monthly Traffic Statistics, September 2019).

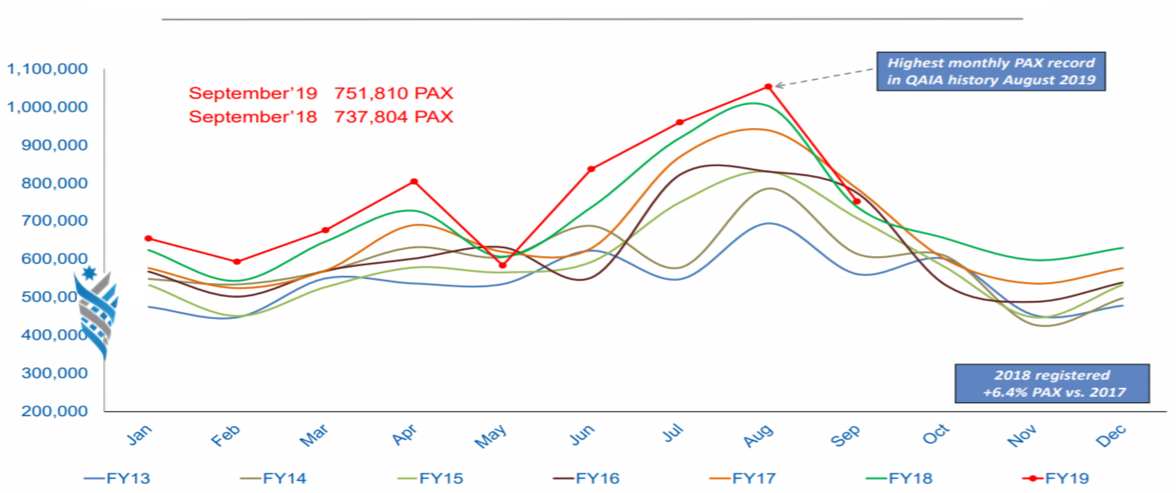

Figure 3 - Passengers Traffic in QAIA (September 2019)

2. Overview of Recent Achievements and Challenges in Jordan's Tourism Sector

The TTCI results notwithstanding, over the past few years, bigger attention was given to tourism from the central and local governments, and this effort has already resulted in some positive outcomes. Nevertheless, challenges remain. Some of the main achievements and challenges are outlined below.

Achievements/ Positive Progress

1. Visa restrictions for some nationalities are finally lifted.
2. Petra visitors reached 1.42 million by early December 2019.
3. The Baptism Site, Aqaba, Wadi Rum and Kerak Castle, registered unprecedented numbers of visitors with Bethany registering an increase of 29.1% by end of November over same period in 2018.
4. The JTB announced a number of new budget airlines will start flying into Jordan in 2020.
5. The formation of a new Medical Tourism Board under JTB.
6. Tourism Transport Regulation is amended and eased entry for new companies, and offered tax exemptions for new and existing companies for 3 years.
7. A new Site Management Plan to be launched in Petra before end of 2019.
8. More international events are putting Aqaba on the map, including Golf tournaments, music festivals and the upcoming international air show planned in March 2020, among others.
9. ASEZA announced special incentives for airlines flying into Aqaba's Airport (AQJ) to boost tourism and reduce seasonal drop through summer months.
10. Ajloun Development Plan for 2020-2022 was announced. This plan is geared towards supporting the development area of Al-Sawan, as a first stage.
11. MoPIC signed a JD500,000 grant agreement to support tourism and hospitality education through the Jordan Hotels & Tourism Education Company (JHTEC). This agreement aims to generate 300 job opportunities annually in Jordan and the region.
12. JITOA and RSCN launched the biggest-ever nationwide clean-up campaign in and around 56 tourism and nature sites with 30,000 participants from all governorates in one day.
13. Several international Awards were received recognizing Jordan's tourism products, such as The Jordan Trail, Queen Alia International Airport and Feynan Eco Lodge.

Challenges/ Gaps

1. Restrictive and outdated tourism laws and regulations, and duplication of some roles between MOTA, ASEZA, PDTRA and some line ministries. efficient
2. Lack of adequate tourist and public transportation to tourism and heritage sites and airport.
3. Lack of informative tourism research and mistrust in published national tourism statistics.
4. Weak incentives offered to local investors.
5. A gap in the four-star hotels, especially in Petra and Aqaba.
6. The need for a convention center of international level in Amman.
7. Unregulated adventures tourism sector.
8. Poor readiness for the upcoming competition from Saudi.
9. Severely underfunded antiquities department resulting in unprotected historical sites and lack of proper historical interpretation in many sites.
10. Outdated and poor presentation at museums.
11. Little awareness on tourism importance and effect of littering in and around tourism sites.
12. Lack of accommodation in Petra and in the North.
13. The inaccessibility of popular sites for people with disabilities and insufficient employment of people with disabilities in tourism establishments.
14. Poor tourism education that does not fulfill private sector needs.
15. Little support and guidance to MSMEs and poor access to finance conditions.
16. Unethical commissions within the souvenir sector.
17. The risk of over tourism in certain sites like Petra, which will eventually lead to a poor tourism experience.
18. Lack of communication and understanding between the various tourism associations and government.


Main Challenges of the Tourism Sector in Jordan
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The need for a modern transportation system
Lack of a clear tourism strategy and risk management system
Unclear mandates for government authorities that regulate the tourism sector
The need for legislative reform
Weak business enabling environment
Lack of data and statistical information about tourism in Jordan
Lack of coordination amongst tourism associations
Lack of capacity in some tourist sites
Date: February 2020
Source: JSF Study "Enhancing the Competitiveness of the Tourism Sector in Jordan: Prospects and Adaptation to New Trends"
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3. Jordan's Competitive Position in the Tourism Sector

The World Economic Forum (WEF) publishes bi-annually the "Travel & Tourism Competitiveness Index" (TTCI) which benchmarks the Travel & Tourism competitiveness for 140 countries and measures. The overall index is comprised of 4 Sub-Indices: (1) Enabling Environment; (2) T&T Policy & Enabling Conditions; (3) Infrastructure; (4) Natural & Cultural Resources, and each of these sub-indices is composed of pillars and 14 prime indicators.

During the period 2009-2019, the ranking of Jordan on the TTCI reflected some serious deterioration. Indeed, in 2019, Jordan ranked 84th out of total of 140 economies, while the United Arab Emirates (UAE) scored best among the Middle Eastern countries. Jordan's rankings on the Travel & Tourism Sector have experienced deterioration in 12 out of the 14 pillars. The biggest drop lies in "Business Environment" (10 places), "ICT Readiness" (21 places), "Tourist Service Infrastructure" (15 places), and in "Human Resources & Labor Market" (37 places).

Figure 4 - Ranking of Jordan on the Travel & Tourism Competitiveness Index, 2019

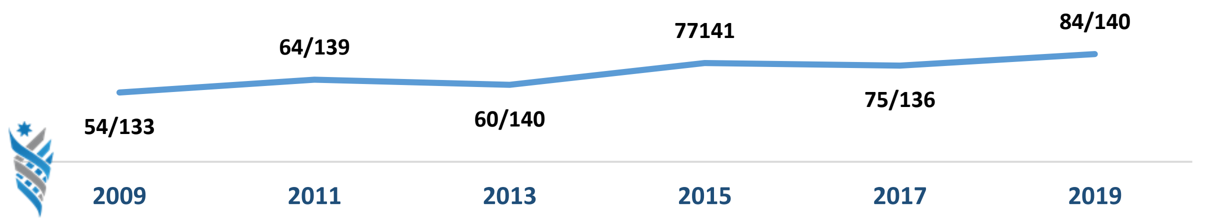
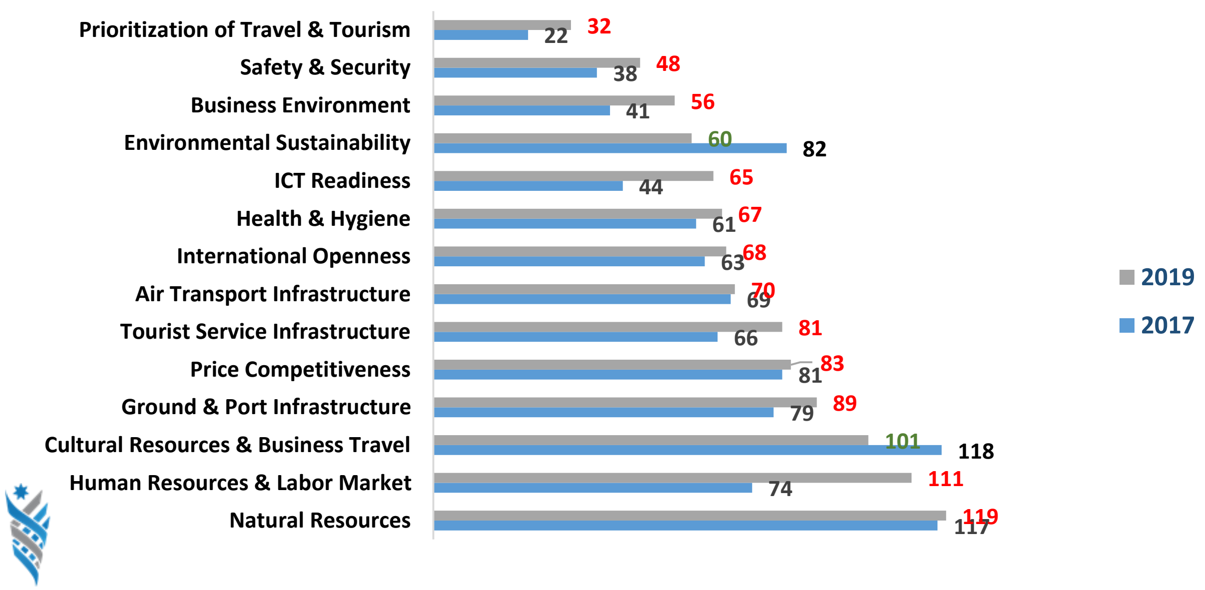


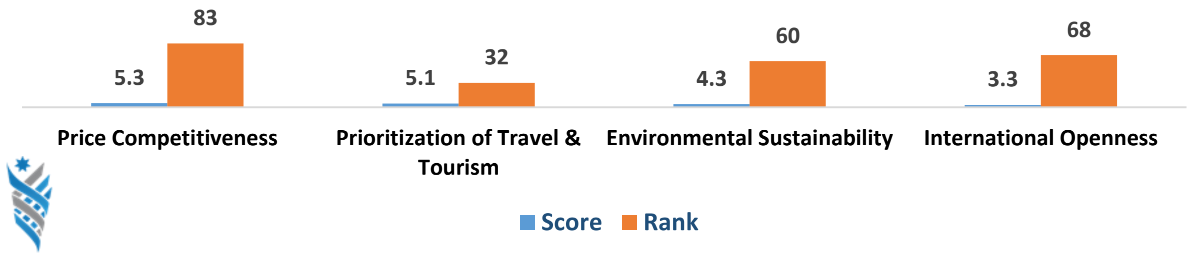
Figure 5 - TTCI Pillars Comparison in 2017 & 2019 for Jordan



Moreover, to encourage the development of various products and facilities within the sector there must be a favorable investment climate for both local and international investors.

A favorable investment climate is affected by many indirect factors, including: poverty, crime, infrastructure, workforce participation, national security, political instability, regime uncertainty, taxes, rule of law, property rights, government regulations, government transparency and government accountability. The T&T Competitiveness Index report assessed the investment climate through a number of enabling criteria in terms of readiness and effectiveness, and Jordan's scores (and rankings) are poor.

Figure 6 - Jordan Policy and Enabling Conditions, TTCI 2019



Investment opportunities in Jordan are presented and managed through a number of entities that offer a range of incentives that slightly differ but generally focus on Tax and customs incentives/exemptions, land and ownership benefits, access to markets (for industries), repatriation of capital, foreign labor, favorable land lease / rent rates. In addition, involved entities offer investment process facilitation from the feasibility stage, through to registration and aftercare. There is big emphasis on tourism sector investments across the board with listed opportunities varying from traditional hotels and restaurants to amusement parks, recreational villages, adventure parks, entertainment facilities and more. However, there is no clear investment map for the tourism sector as a whole that clearly identifies the variety of products needed in each government, that suits various budgets, and that are not replicated in all governorates, allowing each location to build its own image with a different set of products, catering to various traveler segments, and in different seasons.

Access to finance has also been an issue, as banks always refer to tourism as a high-risk industry. There has been attempts through the central bank to introduce special rates for tourism sector, but it might have come at a time when the sector was not ready to invest a penny due to business downturn.

To improve the business climate that enables the sector to grow, we recommend the following:

- It is worthwhile to revise access to finance conditions, especially taking MSMEs into account.
- It is necessary to re-access the current investment facilitation offered to tourism sector investors. It is also important to build local investors' confidence, to encourage higher FDI.
- MOTA should work hand in hand with other public and private institutions to develop a realistic and effective tourism investment road map that will help fulfill the NTS goals. Promotion of the investment map should be done based on a focused plan and targets.
- Explore the creation of a tourism fund (wallet) that will be filled by government, private sector and donor organizations to support MSME projects in par with the approved tourism investment road map and NTS goals with focus on tourism innovation and sustainability.
- Assess the impact of the incentive scheme presented to ASEZ tourism investors and those offered by the PDTRA in terms of their effectiveness to revise and develop a new more lucrative tourism incentive scheme if needed.
- It is necessary to set a periodic and fully inclusive intra-sector and inter-sector dialogue plan to allow everyone better understand current status and set priorities together.
- As for public private partnerships, there are some formalized partnerships in the sector such as in the formation of Jordan Tourism Board, the National Tourism Council (though currently not fully activated), which should help in strategic governance. In addition, a product development committee was lately activated to advise on product development issues.
- There are many opportunities in such partnerships. Revising the regulation for private sector management and maintenance of tourism sites, and include museums and various tourism services, is essential to allow the private sector perform to its specialization. While government would remain the overseeing regulatory body for these partnerships, it is necessary that any rules and regulations for such partnerships are set in coordination with the private sector, rather than imposed by government. Such rules and regulations should be strict in areas of preservation, environmental protection and sustainability, and more lenient in management styles. In addition, there should be incentives offered to the private sector for staff capacity building programs and other to ensure a lucrative process for both parties.

4. Tourism Stakeholders, Sector Governance & Existing Legal Framework

The tourism industry in Jordan is governed by Tourism Law No. 20 (1988) and its ensuing amendments. Further regulations and instructions shape the industry rules, govern five main associations of tourism professions and the respective licensing processes, set a number of public-private committees to help cross-sector dialogue and strategic planning (though they are often inactive).

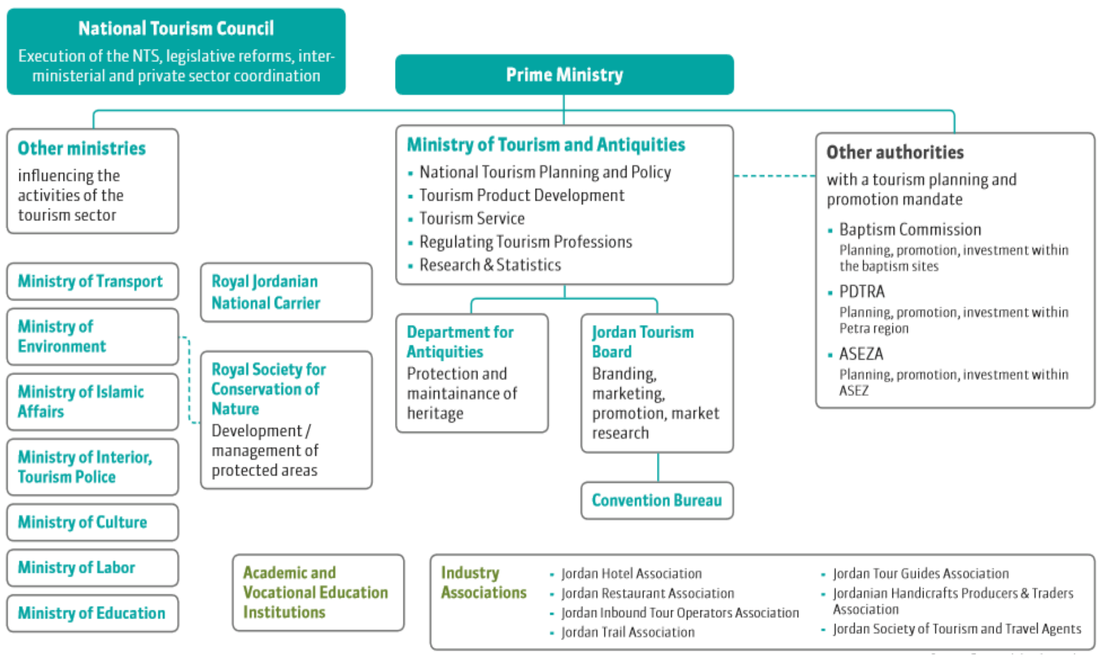
Different decrees set the relationship between MOTA and other government or semi-government entities that are somehow related to tourism. Figure 6 explains the institutional set up in Jordan's tourism sector (developed in 2018), which had some additions set in midyear 2019 as follows:

1. The Medical Tourism Board, set under the Jordan Tourism Board, which now governs the medical and wellness tourism development and promotion

2. The Product Development Committee under MOTA, which oversees the development needs of tourism sites.

3. The new "Adventure Tourism Instructions", which are still under approval, aim at setting the rules for adventure tourism operators and service providers. There is a lot of scrutiny of these instructions from stakeholders. Therefore, it is highly recommended that further revisions and adjustments take place before approval.

Figure 7 - Institutional Set-up of Tourism in Jordan (GIZ, 2018)



Among the biggest challenges within the current legal and institutional structure are the following (Information gathered through sector knowledge, focus groups, various reports and articles):

a) Oudated Tourism Law:

In its current format, the law has many gaps that affect tourism progress. It also lacks superiority to other laws, leading often to bureacracy and inefficiency. However, a recent World Bank assesment matrix was prodcued for the existing legal structure in the tourism sector. It is worthwhile revising it, and if needed, perform additional analysis of existing laws and regulatios/instructions affecting tourism. It is also necessary to revise all non-tourism laws and regulations that affect or supersede the tourism law and result in descrepency or system failure.

b) Lack of a Strategic Road Map to Sector Development:

The last National Tourism Stratgey (NTS) dates to 2011-2015. Despite wide sector consultations by donor projects, a new straegy has not been published. Yet, if we have such a strategy, we still lack an efficient strategy implementation unit, monitoring and evaluation set strategy goals, and limited role of the National Tourism Council (NTC).

c) Lack of a Risk Management System for Tourism:

The sector suffers from poor intra government coordinatoin and lack of a risk management system at government level led to the Dead Sea flash floods tragedy in 2018. For example, in fear of more incidents, the government decided to highly restrict tourism groups and tour operators in managing outdoor activities and Ministry of Education banned all school visits for students without segregating locations with high, medium or low risk impact. This produced a severe drop in Jordanian visitors – especially students - to the Jordan Museum and other sites in 2019 and students are missing on real life visits, which lessens their understanding and appreciation of Jordan's heritage.

To *overcome this situation, we nead to create a risk level category for various nature and heritage sites, and to Introduce special rules for each risk category (without too many complications though) that everyone should abide by (for both education and tourism sectors).*

d) Duplication of mandates between MOTA, JTB, ASEZA and PDTRA:

This leads to duplication of efforts, wasted resources and confusing messages for local and international partners alike. Primary areas to look at: Marketing & promotion, Licensing & company registration, monitoring complaints and incompliances, and crisis management among others.

To get rid of these dublications, the mandates should be revised as part of the legal assessment and fix distinct, complementing responsibilities for all parties. Moreover, it is advisable to institunionalize it through set periodic commuication and coordination in planning and implementation to maximize benefits for all.

e) Limited Effectiveness of Tourism Sector Associations:

Tourism Associations are created to help regulate and support private sector needs through advocacy and lobbying, training, research and development, etc. Sadly today's entities do not fulfill these requirements. There are 2 kinds of tourism associations in Jordan:

- those mandated by the Tourism Law and help govern tourism professions.
- voluntary entities that emerge in different locations with a specific development objective.

In addition, the Tourism Law created a Federation of Tourism Associations, which is currently inactive.

The government can maximize efficiency of these associations in the short and mid-terms through:

- Revise their mandates and assess the current organizational structures and human capacity to carry programs that fulfill industry needs.

- Engage in sector research to support government decision-making process.

- Re-activate the Tourism Federation and ensure regular communication, coordination in relation to NTS implementation, address common challenges, meet with government and present solutions to rising issues, support MSMEs, and create together an emergency fund for crisis management or seed funding for tourism entrepreneurs, among others.

- If the above remains unachieved within the short term, then consider demolishing the existing mandatory associations and Federation and create a Chamber of Tourism that represents the five sub sectors, in addition to tourism transport, local community MSMEs and other stakeholders. Its combined resources will be guided towards tourism research, sector certification and capacity building, lobbying and advocacy, manage development grants and tourism funds, guide investments and strategic developments, among others.

- The Chamber can also be the catalyst for an annual regional tourism event/conference that will help strengthen regional cooperation, shed light on common factors and discuss solutions to common regional issues.

5. Tourism Patterns & Accompanying Services: Prospects & Challenges

Jordan houses an abundance of historical and heritage remains, and rich nature-based attractions that make it a great location for various tourism activities and segments. Market segmentation is necessary to understand visitors' needs and develop the relevant niche tourism products, adequate infrastructure, environmental protection, and certified quality services, and better understand investment and development needs. From a marketing perspective, segmentation is important to gain better insights into the various consumer needs and behavioral patterns, thus identifying better marketing tactics.

Though traditionally, Jordan was regarded as a historical / cultural destination, today Jordan is competing with over 150 international destinations in almost every niche product apart from winter tourism. Each of these niche products has its particularities in terms of infrastructure, seasonality, availability and professionalism of service providers, promotional efforts, and targeted market segments. Some niche products are focused in certain geographical locations, while others are available everywhere, thus spreading benefits from tourism across the country and to different communities. This diversification of tourism products is also necessary to reduce seasonality in Jordan's tourism (i.e. busy times during mild weather: March – May and September- November and Christmas and New Year).

The National Tourism Strategy continues to identify seasonality and the average length of stay (ALS) - which reached 4.7 nights for package tours in 2018 - as primary challenges that can be overcome by better planning, fairer distribution of business throughout the year and variety of products in various geographical locations. However, several challenges are frequently raised regarding product development.

Challenges and Opportunities related to the Tourism Product / Infrastructure:

1. Distinct Image per Governorate or Geographical Location.

To diversify the tourism products, and distribute the benefits to different geographical areas, while offering distinct services and experiences to tourists and visitors, it is necessary to set a clear distinct image for each governorate or geographical location, with a differential cultural product, gastronomy, art, folklore, handicrafts, investment opportunities, architectural styles, etc. based on a set of guidelines. This will help create distinct clusters of tourism products that are not repetitive and diverse wherever the tourist goes.

- There are sites that have a huge significance like Bethany, the Desert Castles, which are severely underdeveloped, but have a huge potential to attract more visitors and offer a much better quality and unique experiences. Therefore, it is necessary to address these sites, and look at new sites like Al Baqoura that can be upgraded to new standards keeping quality and capacity building of those working there in mind.

2. Distribution of Accommodation Facilities:

A. Accommodation facilities are focused in "primary tourism locations (Amman, Dead Sea, Petra, Aqaba and Wadi Rum). Over the past five years, a number of primarily five-star hotels were built in Amman and Aqaba, leaving a big gap for 4-star hotels, at a time where many 3-star hotels were unable to neither invest in renovation nor upgrade their facilities resulting in low quality product. In Wadi Rum, the sporadic spread of new Bedouin camps lead to an oversaturation with camps, some of which are said to be unlicensed, with limited diversity, big competition, and a suffering environment.

B. There is a severe lack in accommodation establishments in Petra and the Northern areas like Jerash, Ajloun, Balqa' and Irbid. The Jordan Investment Commission (JIC) website suggests only a 3-star hotel project in Ma'an governorate and a few recreational projects in Amman and the North. All proposed projects are of a high investment nature and do not suggest opportunities for local communities or small investments. In most of the projects listed on the JIC website, municipalities are considered the focal points rather than MOTA.

- MOTA should work hand in hand with JIC and municipalities to develop a specific tourism investment map with a variety of opportunities for MSMEs and bigger investors, that is equally promoted by MOTA, municipalities, JIC, ASEZA, PDTRA and others. This will also positively affect the average length of stay in the country and encourage domestic tourism.

3. Recreational Outlets and Entertainment:

After 6 p.m., entertainment, remains a key challenge. While many restaurants offer Arabic, foreign or fusion music for locals, and many local plays and performances are becoming more available, these are not outlets traditionally visited by tourists, nor are they promoted to them. Therefore, there is a void in evening folklore / traditional entertainment that offers to tourists a glimpse into the Jordanian or Levantine culture.

- There should be a bigger cooperation between MOTA and Ministry of Culture to encourage local traditional performers to create different programs with traditional folk dances and storytelling in a creative and interactive manner, similar to the performance recently done in Petra, depicting Nabatean culture and traditions.
- It is imperative that each region creates its own distinct set of performances that will complement its image as a destination. This ought to be done first at policy level, and then adopted by the cultural community.
- Big festivals and events in Aqaba have a huge potential for local and regional markets. Similar to the Amr Diab concert, it can create off-season tourism that benefits local hospitality, F&B outlets, transportation, etc.

4. Tour Services:

Traditionally, tours have been offered to foreign visitors, while local Jordanians or Arab tourists showed little interest. Today, local tours have become more popular among Jordanians, especially with the rising popularity of adventure tourism and various nature and cultural trails. The government and the private sector are developing these trails and offering them to the public along with a variety of services offered by local community members. There is a variety of nature and city trails that suit all tastes. There are a few challenges nevertheless that are worthwhile mentioning:

- The under-regulated adventure sector poses a high risk for tourists, local and international. Therefore, it is necessary to revise and complete the proposed adventure instructions ASAP and ease unnecessary restrictions, without compromising standards required for quality service, and travelers' safety.
- Link the regulations to a clear risk management system that involves all relevant public and private stakeholders.

- MOTA should launch an awareness program for Jordanians and encourage use of licensed tour guides, tour operators and service providers when going on tours and hikes. This will minimize accidents and negative effect of amateur programs that may damage the experience and the environment.
- MOTA should publish on its website a list of licensed operators and tour guides per city or governorate for easy reference. MOTA should also use artificial intelligence to gather visitor feedback on services of tour operators and service providers and link it to an incentive program for licensing and capacity building.
- Introduce a modern classification system for tour operators that will be linked to a government incentive system during re-licensing, as well as fiscal incentives and others. This system should focus on institutional capacity to manage programs for various products, safety and risk management systems, insurance and operation quality.

Air Transport

The "Open Skies" agreement signed in 2010 by Jordan and the EU allowed new airlines to fly to Jordan. Starting with the EasyJet flights between Amman and London (which ceased operation after 3 years 2011-2014, due to high taxes), followed by Ryan Air, which opened 15 new routes between Jordan and short / medium haul European destinations, majority of which were completely new (to both Amman and Aqaba). This has resulted in a great promotion for Jordan in the international markets, enhanced accessibility with competitive prices, thus lowering the overall Jordan package. Following this success, Easy Jet decided to reopen its line to Jordan, but this time to Aqaba with several flights a week.

QAIA numbers reached record high in August 2019 with 751,810 passengers, and Ryan Air undoubtedly featured as top airline with most positive contribution (at 4% impact to overall traffic change).

King Hussein International Airport numbers in Aqaba have also seen a steady rise in regular flights between 2018 and 2019 (Easy Jet, Ryanair, Petroleum Air Services, Ural Airline and Nordwind). However, there is a strong decrease in charter flights due to the increase and competitiveness of LCC flights.

Figure 8 - QAIA - Airlines and Routes with Positive Contribution (QAIA 9/2019 Update)

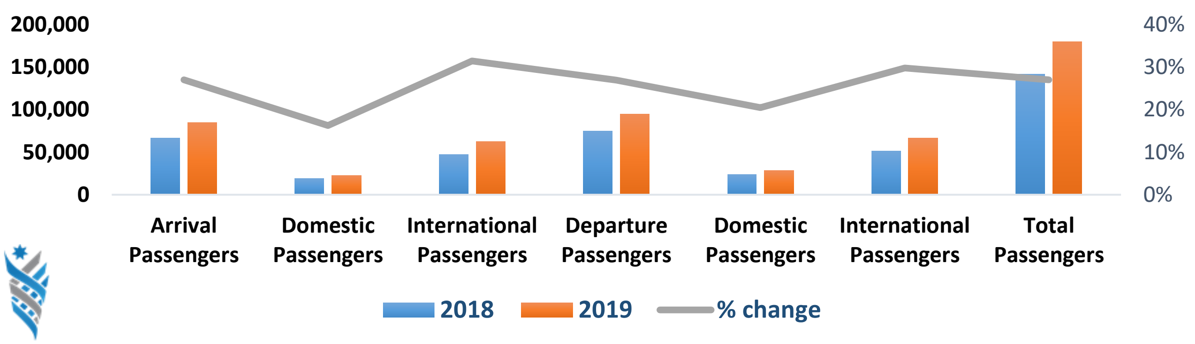
Airlines with Positive Contribution MTD Sept. '19

Rank	Code	Airline	Impact to Overall Traffic Change
1	RYR	RYANAIR	4.0%
2	JAV	JORDAN AVIATION	1.7%
3	QTR	QATAR AIRWAYS	0.6%
4	FJR	FLY JORDAN	0.5%
5	THY	TURKISH AIRLINES	0.4%
6	RAM	ROYAL AIR MAROC	0.3%
7	MSC	AIR CAIRO	0.2%
8	OMA	OMAN AIR	0.2%
9	KNE	NATIONAL AIR SERVICES	0.2%
10	QBA	QUEEN BILQIS AIRWAYS	0.2%

Routes with Positive Contribution MTD Sept. '19

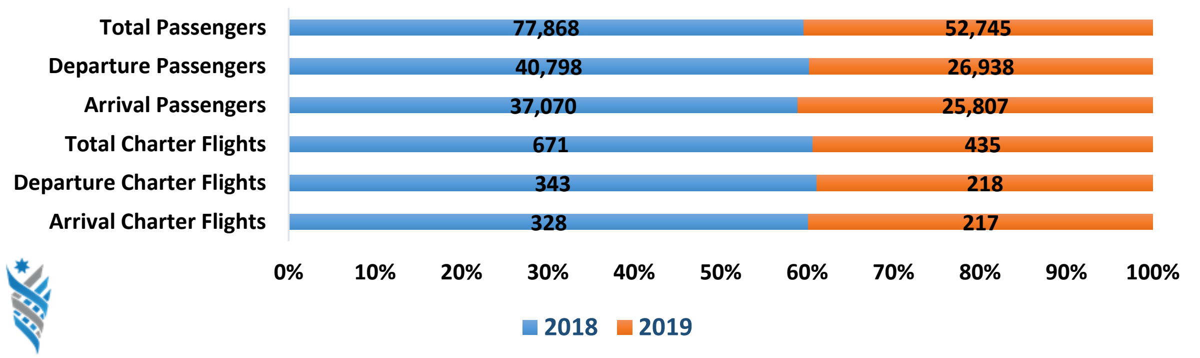
Rank	Code	Airport	Impact to Overall Traffic Change
1	IST	ISTANBUL	2.4%
2	TZX	TRABZON	0.8%
3	BGY	MILAN-ORIO SERIO	0.5%
4	KWI	KUWAIT	0.5%
5	BLQ	BOLOGNA	0.4%
6	KRK	KRAKOW	0.4%
7	WMI	WARSAW	0.4%
8	VNO	VILNIUS	0.4%
9	BRU	BRUSSELS	0.4%
10	PRG	PRAGUE	0.4%

Figure 9 - Total Passengers via Aqaba Airport - Regular Fligts Jan - Sept 2018/2019



Source ASEZA, December 2019

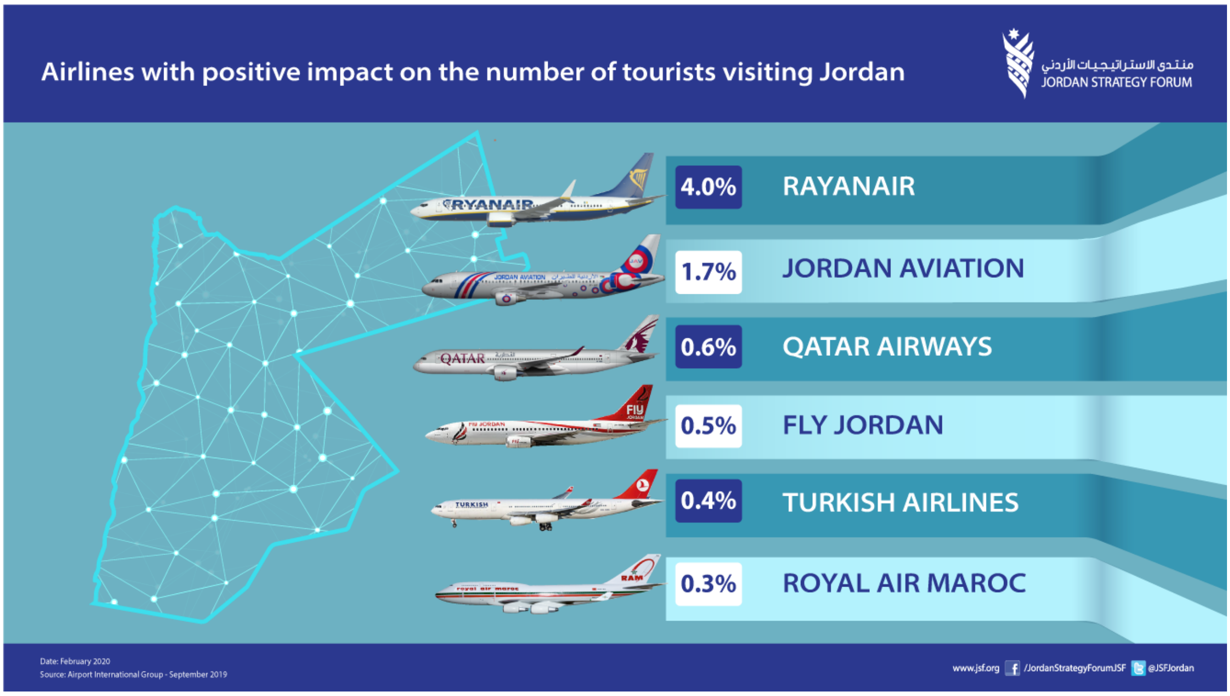
Figure 10 - Aqaba Airport Charter Flights and Passengers. ASEZA, December 2019



Air Taxi – A new service, launched in 2018 and operated by the Golden Eagle Aviation Academy, is offered to tourists and residents alike. It offers a variety of prices and routes starting with a simple city tour of Amman, to a tour of Jerash, Dead Sea and other landmarks along with a program of visits and lunch. It is a great way to promote Jordan for business travelers.

With increased air access, the number of individual travelers to Jordan rose, 3 and 4-star hotels received more customers, restaurants and camps flourished, rent-a-car companies received more clients. Overall, the benefits are spread geographically and to local communities.

- Therefore, we recommend that government continue to support and incentivize new Low Cost Carriers (LCC) to open new routes and itineraries.



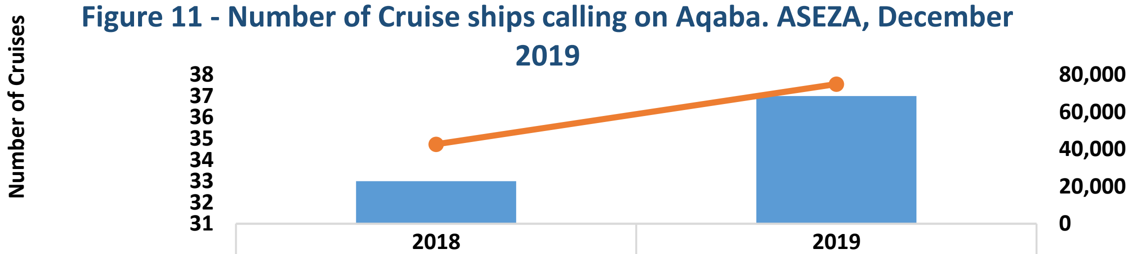
Sea Transport – Cruise Ships

1) Being Jordan's only seaport, Aqaba receives cruise ships with thousands of tourists for a day or two, taking land tours to Petra, Wadi Rum and the city of Aqaba. Most of these cruises arrive in April and October.

2) With the expansion of Aqaba port, a new dock has been assigned for cruise ships, with more streamlined and facilitated entry processes for tourists.

3) The majority of local ground handlers (tour operators) that work with the cruise ships and offer tours are well-rounded professionals with good experience in the market.

Figure 11 - Number of Cruise ships calling on Aqaba. ASEZA, December 2019



	2018	2019
Total Cruises	33	37
Total Passengers	42,735	75,035

Since Aqaba cruise industry is still from reaching its potential, it is necessary therefore to:

- Build capacity of new tour operators in Jordan generally, through a certification program to attract and professionally handle such operations. Develop stronger cooperation and partnership between ASEZA and PDTRA to better handle the big inflow of tourists from cruise ships.
- Encourage more cruises to call on Aqaba and build a calendar of docking cruises to redirect certain calls to other dates when necessary, before they are advertised and sold. This will allow better flow management and tourism transport provision especially when several cruise ships are docking on the same day.

Land Transportation / Tourist Busses

A. For the past 2 years, the availability of clean, adequate and modern tourist busses presented a big challenge in the tourism sector. Due to slow business, bus fleets were on low maintenance with minimal investments. As a result, once tourism picked up, there was a big shortage in tourism transportation. The biggest number of complaints received by MOTA and JTB in this period were related to busses. In 2019, several tourist bus accidents occurred, which raised the red flag.

B. An amended Tourism Transport Regulation was issued (No. 37 for the year 2019), where new tax exemptions and incentives were offered through 2019-2020 for those wishing to open new companies or upgrade existing fleet. Incentives included reduction in startup capital, lower number of initial operating busses, and lower registration and other fees. An important amendment introduced a maximum operating age for vehicles (12 years for large and medium sized busses, and 10 years for smaller ones).

- The new incentives present an opportunity for the banking sector to offer loan facilities for the group of established bus companies and those in-the-registration-process.

C. One of the newest services is scheduled bus routes to most of the main tourism sites through JETT company, which once used to operate scheduled routes to Petra and Aqaba only, but now have departures to the Dead Sea and the Baptism Site, Jerash and Ajloun, Madaba, Wadi Rum, linking it to with Aqaba and Petra (the Golden Triangle), among a few others. Despite sector resistance, this addition has added a new affordable choice to tourists (and residents) who are looking for affordable ways to go around.

There are 10 specialized tourist bus companies in Jordan, with a total fleet of 780 busses, of which:

- **Large Busses (50 passengers)– 530;**
- **Medium Busses (31 passengers)– 45;**
- **Small Busses (10-22 passengers) – 127;**
- **Vans (up to 10 passengers) – 45.**

In 3 years, with the implementation of the amended tourism transport regulation, 494 of these busses are expected to be out of service:

- **Large Busses – 366**
- **Medium Busses – 30**
- **Small Busses – 66**
- **Vans - 32**

Source: Specialized Tourism Transport Association, December 2019, Jordan

Border Crossings and Entry to Jordan Formalities

There are three land border crossings to Jordan in the Jordan Valley and Wadi Araba, and all three have different entry and exit rules, 2 of them are managed by the Ministry of Interior (MOI) and one is managed by ASEZA. Furthermore, the two airports have different formalities to land borders and different rates, which adds up to the confusion. These rules tend to change periodically without proper advance notification, nor discussion with MOTA, which results in occasional problems upon arrival, strains the operation process for tour operators and confuses individual travelers.

- This issue should be resolved between the relevant ministries with the tourist in mind. Procedures should be unified and simplified. Introducing e-visa and elevating restrictions on many nationalities should also ease the process (recently MOI announced new eased formalities for certain restricted nationalities processing a valid US, UK or Schengen Visas, as well as Gulf countries' residency).

6. Tourism Research and Role of Academia in Capacity Building & Marketing

Tourism Research

With a growing tourism sector, it has become essential to provide quality information to government, businesses and students, for a better decision-making process and a more relevant learning path. Today, tourism information / research is very scarce in Jordan. Apart from documents published by the donor organizations, occasional consultancy reports, and raw numbers provided by MOTA, Central Bank of Jordan (CBJ) and the Department of Statistics (DOS), there is a big void in good, relevant and timely information. Furthermore, the available statistics provided by MOTA is often criticized by the industry for being inaccurate and inflated.

Some of the main issues raised in relation to tourism research are related to:

A. The unclear definition of tourist vs. visitor. This confuses many in the sector including the media reporting on tourism numbers.

B. Difficulty in finding all tourism data in one place. MOTA website provides many tables with raw numbers, while ASEZA, PDTRA and JTB offer no publicly available information.

On a positive note, this creates opportunities for private sector entities, research houses and universities to commission their own tourism studies and market them. As a result, it is important to:

- All entities working in tourism should follow the same definitions, and use unified data systems, and allow easy and timely access to such information.
- Provide analyzed data with accurate information from all tourism stakeholders. A good example could be the UNWTO quarterly Tourism Barometer Report.
- Encourage bigger interaction between the academia and tourism sector to create better understanding of the current conditions, and thus provide students with quality research and tools.
- Conduct quality research on international markets and publish data to help the sector (public and private) in taking marketing and product related decisions.
- In the short to medium term, establish a **Tourism Research Center**, under the Tourism Chamber or elsewhere, to provide accurate and quality analysis of the tourism sector's progress and needs.

Capacity Building

Integration between Academia and tourism sector is important for research purposes, and for providing the sector with quality graduates. However, there is a clear gap between what students learn in classrooms and what actually is required in practice. And although we boast of Jordan's workforce and our level of education, Jordan's results in the travel and tourism competitiveness indicators in this area are actually the worst of all indicators! Jordan is positioned way after the 100 among 140 assessed countries in 2019. This is attributed to the fact that:

1. Most academics have not been through real life private sector experience, which results in generic and theoretical knowledge, and when passed on to students, results in low quality graduates, unaware of practical work needs, and with limited understanding of local policies and challenges.

2. Hospitality and tourism education does not received adequate attention from the government, as evidenced by the fact that the grades required to join this educational stream requires the lowest entry grades, leading to the entry of many students who are not interested in tourism, but they have found it the only option available to them.

3. Though hospitality training is more advanced and receives bigger attention through the high school Fundukia program and VTCs, the majority of the students lack language skills (English) which is essential for interaction with guests and career advancement.

4. Tour Guides education program is undergoing major scrutiny in terms of program quality, lack of segment specialization, poor social and communication skills that are necessary to enrich the guided tours.

5. There are just a few educational programs offered for the tour operators' business and/or event management. They offer limited knowledge and barely any internship opportunities resulting in on the job training from scratch by the employers. English language also remains a big challenge.

6. MSMEs and local community projects lack guiding and access to finance opportunities to grow their businesses, with minimal integration with tourism stakeholders and ensure that they offer saleable products, needed by the tourism community.

A new approach to partnership should be created between the tourism industry and educational institutions for the provision of tourism education and research. Such partnerships will facilitate the development of skills and build a practical framework for effective collaboration among industry stakeholders. It will also support marketing activities and will allow the use of focused and demand driven marketing strategies and tools that will further enhance Jordan's positioning.

- Major approaches to partnership should include internships, practical training, graduate employment, and financial incentives/tax breaks for tourism employers related to skills development and tourism education.
- Marketing Jordan and its brand is not only the responsibility of JTB, but also private sector, academia and other government entities. All should be united in using and understanding the Jordan brand, and work together to portray a quality image behind it.

7. Environmental and Heritage Conservation Role in Tourism Sustainability

Heritage conservation practices in Jordan are spearheaded by several bodies:

Heritage Conservation Leaders

Jordan Department of Antiquities - second arm of the Ministry of Tourism & Antiquities tasked with excavations, preservation of heritage sites and conservation and managing country museums.

The Petra National Trust works on preservation projects, advocacy and an innovative cultural education and awareness programs with public school students ages 7-18 and teachers with the aim of building awareness and pride of the value of culture and heritage to the daily lives of local communities, thus foster a new generation of cultural leaders.

The Jordan Museum –serves as a comprehensive national center for learning and knowledge that reflects Jordan's history and culture in an engaging yet educational way. The Jordan museum presents a good example of progressive museums management and interaction with its visitors.

As elsewhere, there are challenges commonly faced by these organizations that can be summarized as follows:

A. Severe lack of funding: Both the Department of Antiquities (DOA) and Jordan Museum are government entities that are severely underfunded for the task they are meant to perform. This hinders preservation / conservation efforts and prevents them from recruiting highly qualified employees to accomplish the tasks at hand.

B. The poor museums' experience due to lack of funding and expertise, results in a lost opportunity to showcase the enormity of Jordanian heritage and culture.

C. Inadequate support to the educational process, which would allow school children better understand their heritage and have pride in their national identity.

- Government should revise funding for DOA and other relevant heritage conservation partners to help them fulfill their objectives and focus on upgrading available museums to become more interactive, innovative and appealing experiences. This can be achieved by encouraging private sector investments in heritage management. Thus, the DOA should become a prime partner in the PPP structure, overseeing conservation and management efforts by private sector.
- Upgrade the capacity and standards of local tour guides and encourage their hiring for school visits, as a tool to support the guides, while giving children maximum benefit from the tourism experience.

Environment Conservation Leaders

الجمعية الملكية لحماية الطبيعة RSCN

The Royal Society for the Conservation of Nature (RSCN), which was set in the 1960s in a step to preserve the natural environment of near extinct animals, birds and plants. Since then RSCN grew into an organization offering a sustainable development model for environmental conservation of natural habitats. Today it manages 11 reserves with diverse natures and produces great impact on the livelihoods of the communities surrounding these reserves.

Royal Marine Conservation Society of (JREDS)

The Royal Marine Conservation Society of Jordan a non-profit organization established in 1995. It currently focuses on 3 distinct programs: Marine Conservation, Outreach and Advocacy and Sustainable Development.

In addition to JREDS and RSCN, many ministries and semi-government institutions are responsible for the environmental impact of tourism, as well as encouraging environmentally friendly practices by tourism establishments. This area is receiving a lot of attention recently by the government. Therefore, we would like to emphasize the importance of:

- Reduce the amount of waste from tourism by introducing “leave no trace” practices for all tourism stakeholders and the Jordanian public. Derived from adventure tourism practices, this concept must be embraced by government, tour guides, tour operators, hospitality establishments, transport companies, and the general public through rigorous awareness campaigns.

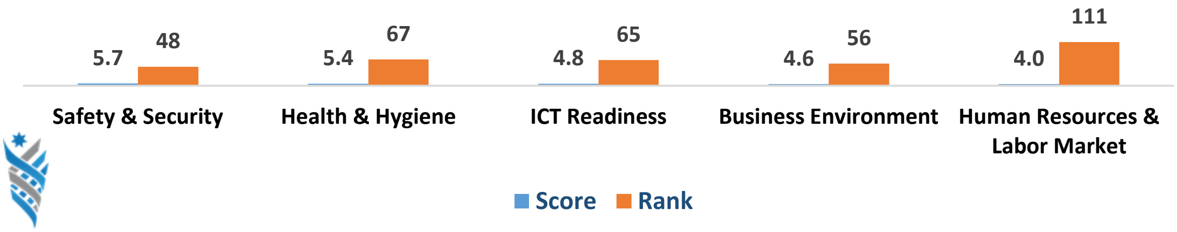
- Encourage solar energy use to reduce energy waste and reduce electricity bills; a common concern of hospitality establishments.

- Encourage private sector investment in a composting facility to work with 5-4 and 3-star hotels (possibly through JHA in cooperation with Ministries of Environment and Agriculture) to produce free and environmentally friendly fertilizers, thus reducing waste, energy and financial resources necessary for maintaining greenery in resorts, and support Jordanian farmers.

8. Tourism and Supporting Industries

Naturally, tourism interacts with and affects a variety of other sectors, which presents an opportunity for cooperation and mutual benefit. The TTCI report looked at the various enablers for tourism, and similar to the overall country indices these scored very low too:

Figure 12 - Jordan Enabling Environment, TTCI 2019



Within this context, the question here is how tourism and the other sectors affect each other, and what are the present opportunities for mutual growth?

1. Transport Sector:

A. The public transport sector is an important part of the integral tourism activity. With the rise of individual travelers, road and public transport infrastructure can highly benefit from tourism while simultaneously, cater to its own citizens with better, higher quality, eco-friendly transport facilities. Environmentally friendly driving vehicles will reduce emissions and will keep the city cleaner which is a very positive indicator for a rise in tourism arrivals.

B. The airports are also an important component of the transport infrastructure and are positively affected by the rise in all kinds of tourism. However, airport authorities need to acknowledge the need to closely cooperate and coordinate with the tourism industry stakeholders to better support them.

2. Information Technology Sector:

A. Today, tourism stakeholders heavily rely on the IT infrastructure to promote and sell their products on one hand and manage their businesses on the other. With Jordan being a regional hub for IT, it offers the tourism sector a great opportunity to benefit from innovative technologies and applications that will help reach target clients in geographical locations where they have never been present.

B. Unfortunately, there is some resistance within the tourism sector, to fully embrace IT per se. This is due, partially, to the investment cost required, as well as limited understanding of both the tourism and IT sector players of their mutual specific needs. In 2019, the GIZ MSME Project initiated linkage through the IT Association of Jordan – INTAJ and JITOA, in an effort to bring the two sectors closer. In its 2020 plan, the GIZ will continue working with both sectors for a bigger mutual understanding and cooperation.

C. MICE presents an opportunity for mutual cooperation. With the growing number of international high-quality conferences and exhibitions in the IT sector in Jordan, there is a growing opportunity to work closely together to obtain more competitive prices, offer professional event management services, and optional tourism programs for participants. This formula will enable each sector to manage the role they do best and encourage more and more events to come to Jordan.

- MICE cooperation is applicable to all industries, since there are conferences and exhibitions, and other events that take place in all sectors. Encouraging the tourism sector (particularly tour operators, event management companies and Destination Management Companies (DMCs)) to get involved will help create a better product and result for all.

3. The Medical Sector

A. Jordan's medical sector has traditionally focused on Arab "tourists", patients that seek medical care in Jordan, while using tourism infrastructure, hospitality facilities, restaurants, supermarkets, transportation, and entertainment facilities. This positively affects all industries involved. For the tourism sector, this presents an opportunity, where tour operators can direct part of their services to assist such patients / tourists and their families in arranging their stays. This will give rise to a new service that can benefit all parties.

B. In the last 5 years, the medical tourism sector in Jordan has been suffering, due to a number of factors including increased regional competition. In 2017, the International Health Care Center issued the "Medical Tourism Index" in which Destination Environment, Medical Tourism Industry, and Quality of Facilities and Services were measured using international databases. On the overall index, Jordan ranked 33rd out of 40 countries, and 5th in the MENA region (following UAE, Egypt, Qatar and Morocco). Despite this, the World Bank considers Jordan as the best healthcare service provider in the Arab World. This is attributed to the 9 JCI accredited hospitals (including the King Hussein Cancer Center), as well as physicians' and surgeons' affiliation with top US medical centers such as Cleveland Clinic and John Hopkins.

C. Spearheaded by Private Hospitals Association (PHA), a medical tourism department was created at the JTB, and a Medical Board instituted, with the aim of promoting Jordan as a medical and wellness destination, which should foster investment and attract international medical conferences to Jordan.

D. Although many private hospitals already offer a "tourism" service to their clients, with a full package of accommodation, transport, meet and assist, bigger cooperation between PHA members and the tourism sector will open new opportunities for offering side tours or recreational activities for family members at preferential rates, as well as special wellness programs, which will help the whole family make the best out of a medical or a recovery process.

Therefore, if Jordan is to regain its status as a medical regional center, it needs to look at the medical / wellness tourism from a whole new perspective, take new megatrends into consideration and work diligently on upgrading its product on one hand, and attract new markets on the other. This can be achieved through:

- Developing a new branding strategy and finding the right target clients not only in traditional neighboring countries but in other destinations as well.

- Addressing its accessibility readiness for people with various disabilities. This entails accessible facilities, roads and transport infrastructure, in addition to embracing technology that supports people with disabilities (such as those offering easy interaction with the deaf and blind).

- Training and capacity building for medical sector employees in dealing with foreign guests including English language knowledge, as well as capacity for tour guides, tour operators and hotel staff in better understanding the medical tourist needs, interests and ways to approach them. It is also necessary to train tour guides/nurses in dealing with people with mental or physical disabilities, while offering a culturally rich experience

- Spas and medical-focused destination spas should further embrace diagnostic medical technology for real time health monitoring and to facilitate a better connection between doctor and patient. With the lack of such facilities, there should be incentives for an investment opportunity for such projects at the Dead Sea and Ajloun (Tourism Megatrends, Horwath HTL Corporate, February 2019).

- With the significant emphasis on healthy lifestyles, a spectrum of “healthy trends” should be incorporated into tourism services such as providing tourists with physical fitness programs, life coaching, stress management programs, healthy and diverse nutrition options, and other services that provide tourists with a positive energy. Such services are expected to increase the attractiveness of tourism sites, transforming them from “one-time visit destinations” to “multiple visits destinations” (Tourism Megatrends, Horwath HTL Corporate, February 2019).

9. Looking Ahead:

Tourism can be big for Jordan. It is a huge, but at the same time volatile industry, and it is only by positioning tourism at the forefront of economic development that government and private sector can achieve the sector's envisaged positive results. To get there, we need to:

1. Prioritize tourism at the government level and proclaim it officially as a main economic industry that all other industries need to help sustain.

2. The sector needs a major reform to its legal and institutional structure, build sector capacity, deploy all other industries to support tourism development, and enable the private sector to play a bigger role and compete well.

3. Make sure that all relevant stakeholders take seriously the contents of the WEF' "Travel & Tourism Competitiveness Index". Jordan's scores and rankings in the Index's 14 prime indicators should be continuously followed, and whenever possible, remedial measures to be adopted.

4. Environmental and Heritage protection should be a number one concern! Government rules should enable local enforcement of rules and regulations that do not allow messing with nature. Petra will never be able to sustain its status if the rest of Jordan is filled with litter and portrays a filthy image.

JSF full recommendations to improve the tourism sector in Jordan are detailed in Annex1.

10. Annex (1)

Pillar	JSF Recommendations
Travel & Tourism Competitiveness	1. To revise access to finance conditions, especially taking MSMEs into account. 2. It is necessary to re-access the current investment facilitation offered to tourism sector investors. It is also important to build local investors' confidence, to encourage higher FDI. 3. MOTA should work hand in hand with other public and private institutions to develop a realistic and effective tourism investment road map that will help fulfill the NTS goals. Promotion of the investment map should be done based on a focused plan and targets. 4. Explore the creation of a tourism fund (wallet) that will be filled by government, private sector and donor organizations to support MSME projects in par with the approved tourism investment road map and NTS goals with focus on tourism innovation and sustainability. 5. Assess the impact of the incentive scheme presented to ASEZ tourism investors and those offered by the PDTRA in terms of their effectiveness to revise and develop a new more lucrative tourism incentive scheme if needed. 6. It is necessary to set a periodic and fully inclusive intra-sector and inter-sector dialogue plan to allow everyone better understand status and set priorities together. 7. As for public private partnerships, there are some formalized partnerships in the sector such as in the formation of Jordan Tourism Board, the National Tourism Council (though currently not fully activated), which should help in strategic governance. In addition, a product development committee was lately activated to advise on product development issues.
Sector Governance & Existing Legal Framework	1. A recent World Bank assessment matrix was produced for the existing legal structure in the tourism sector. It is worthwhile revising it, and if needed, perform additional analysis of

	existing laws and regulations/instructions affecting tourism. It is also necessary to revise all non-tourism laws and regulations that affect or supersede the tourism law and result in discrepancy or system failure. 2. Creating a risk level category for various nature and heritage sites, and to Introduce special rules for each risk category (without too many complications though) that everyone should abide by (for both education and tourism sectors). 3. Revise the mandates and assess the current organizational structures of the tourism associations and human capacity to carry programs that fulfill industry needs. 4. Re-activate the Tourism Federation and ensure regular communication, coordination in relation to NTS implementation, address common challenges, meet with government and present solutions to rising issues, support MSMEs, and create together an emergency fund for crisis management or seed funding for tourism entrepreneurs, among others. 5. If the above remains unachieved within the short term, then consider demolishing the existing mandatory associations and Federation and create a Chamber of Tourism, that represents the 5 sub sectors, in addition to tourism transport, local community MSMEs and other stakeholders. Its combined resources will be guided towards tourism research, sector certification and capacity building, lobbying and advocacy, manage development grants and tourism funds, guide investments and strategic developments, among others.
Hotels and Accommodation Facilities	1. MOTA should work hand in hand with JIC and municipalities to develop a specific tourism investment map with a variety of opportunities for MSMEs and bigger investors, that is equally promoted by MOTA, municipalities, JIC, ASEZA, PDTRA and others. This will also positively affect the average length of stay in the country and encourage domestic tourism.

Transportation	1. Attracting more investments in the land transportation. 2. Build capacity of new tour operators in Jordan generally, through a certification program to attract and professionally handle such operations. Develop stronger cooperation and partnership between ASEZA and PDTRA to better handle the big inflow of tourists from cruise ships. 3. Encourage more cruises to call on Aqaba and build a calendar of docking cruises to redirect certain calls to other dates when necessary, before they are advertised and sold. This will allow better flow management and tourism transport provision especially when several cruise ships are docking on the same day. 4. The government should continue to support and incentivize new Low Cost Carriers (LCC) to open new routes and itineraries.
Tourism Research	1. All entities working in tourism should follow the same definitions, and use unified data systems, and allow easy and timely access to such information. 2. Provide analyzed data with accurate information from all tourism stakeholders. A good example could be the UNWTO quarterly Tourism Barometer Report. 3. Encourage bigger interaction between the academia and tourism sector to create better understanding of the current conditions, and thus provide students with quality research and tools. 4. Conduct quality research on international markets and publish data to help the sector (public and private) in taking marketing and product related decisions. 5. In the short to medium term, establish a Tourism Research Center, under the Tourism Chamber or elsewhere, to provide accurate and quality analysis of the tourism sector's progress and needs.

Environment and Sustainability	1. Reduce the amount of waste from tourism by introducing “leave no trace” practices for all tourism stakeholders and the Jordanian public. Derived from adventure tourism practices, this concept must be embraced by government, tour guides, tour operators, hospitality establishments, transport companies, and the general public through rigorous awareness campaigns. 2. Encourage solar energy use to reduce energy waste and reduce electricity bills; a common concern of hospitality establishments. 3. Encourage private sector investment in a composting facility to work with 5-4 and 3-star hotels (possibly through JHA in cooperation with Ministries of Environment and Agriculture) to produce free and environmentally friendly fertilizers, thus reducing waste, energy and financial resources necessary for maintaining greenery in resorts, and support Jordanian farmers.
The Medical Sector	1. Developing a new branding strategy and finding the right target clients not only in traditional neighboring countries but in other destinations as well. 2. Addressing its accessibility readiness for people with various disabilities. This entails accessible facilities, roads and transport infrastructure, in addition to embracing technology that supports people with disabilities (such as those offering easy interaction with the deaf and blind). 3. Training and capacity building for medical sector employees in dealing with foreign guests including English language knowledge, as well as capacity for tour guides, tour operators and hotel staff in better understanding the medical tourist needs, interests and ways to approach them. It is also necessary to train tour guides/nurses in dealing with people with mental or physical disabilities, while offering a culturally rich experience. 4. Spas and medical-focused destination spas should further embrace diagnostic medical technology for real time health monitoring

	and to facilitate a better connection between doctor and patient. With the lack of such facilities, there should be incentives for an investment opportunity for such projects at the Dead Sea and Ajloun (Tourism Megatrends, Horwath HTL Corporate, February 2019). 5. With the significant emphasis on healthy lifestyles, a spectrum of “healthy trends” should be incorporated into tourism services such as providing tourists with physical fitness programs, life coaching, stress management programs, healthy and diverse nutrition options, and other services that provide tourists with a positive energy. Such services are expected to increase the attractiveness of tourism sites, transforming them from “one-time visit destinations” to “multiple visits destinations” (Tourism Megatrends, Horwath HTL Corporate, February 2019).

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