International Tourism Outlook Report

Project: Curated Experiences
Developing innovative and diversified touristic products across Jordan

October 2021

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ABBREVIATIONS AND ACRONYMS

Abbreviation or Acronym	Meaning
LI	Leaders International
JH	Jordan Heritage
HKJ	Hashemite Kingdom of Jordan
LCT	Last Chance Tourism
DST	Dark Sky Tourism
DSP	Dark Sky Preserve
WTO	World Tourism Organization
RSCN	Royal Society for the Conservation of Nature

PROJECT BRIEF

Curated Experiences: Developing Innovative and Diversified Touristic Products Across Jordan

This project aims at reviving the once-flourishing tourism industry within Jordan, in light of COVID-19 devastations to the sector. The project seeks to improve on pre-existing weaknesses in the Jordanian tourism sector; namely the dependence on the 'Golden Triangle' consisting of Petra, Wadi Rum, and Aqaba, which hinders the sector's resilience to unforeseen events. In doing so, Leaders International will enhance the competitiveness of the industry through diversifying touristic offerings and adapting to recent travelling trends, such as solo travelling.

Moreover, the project will build the capacity of travel-experience operators through different support mechanisms, business linkages, and training programmes; to enable them to provide curated experiences to inbound and local travellers. At the industry level, the project will cooperate with Jordanian tourism associations to promote Jordan's cultural, historical, and natural diversity. Local authorities will also be involved in expanding Jordan's current tourist base, mitigate risks associated with limited product offerings, and lastly, enhance local tourism through increased quantity and quality of products and offerings.

Accordingly, Leaders International will not merely focus on the innovation and product development side but will market the new travel experiences and leverage its outreach channels to speak to the needs of the modern traveller, in Jordan and abroad.

The Curated Experiences project is supported by the Embassy of the Kingdom of the Netherlands under its Netherlands – MENA partnership (Shiraka) to nurture economic growth and stimulate employment.

LEADERS INTERNATIONAL

Kingdom of the Netherlands

EXECUTIVE SUMMARY

The tourism outlook report reviewed the general tourism trends internationally, prior to and post COVID-19 and found that travel restrictions is a key determinant in tourism rebound; solo and female travel is substantial; digitisation is a necessity; sustainability is a growing requirement of tourists; localised experiences are in substantial and growing demand; and digital nomadism and workationing are valuable and thought to outlast the pandemic.

The report subsequently went on to showcase the key touristic products internationally and evaluate the competitive advantage of Jordan's touristic product offering. The report concluded by identifying spiritual tourism, wellness tourism, ecotourism, and cultural heritage tourism as the products with the most substantial evidence as sustainable and growing touristic products for Jordan.

To enable this, a literature review was conducted for concrete international tourism forecasts and found scarce data, as well as divided opinions on the start of the sector's rebound and the speed of its recovery to early 2019 levels. Thenceforth, the report evaluated the strengths, opportunities, weaknesses, and threats for each of the four broad sections of tourism (leisure, wellness, ecological, and cultural) as well as nine subsections of the main aforementioned sections; and those were spa, yoga and meditation, birdwatching, dark sky, agricultural, spiritual, battle reenactment, gastro, and film tourism.

Based on the thorough analysis conducted, the report goes on to recommending that leisure tourism is not Jordan's most competitive tourism product offering; wellness with spa, yoga and meditation is a recommended product; ecotourism holds unique competitiveness for Jordan especially in birdwatching; cultural tourism cannot be excluded with two spiritual trails seen as strong itineraries for a loyal and resilient target market; and that agricultural, battle reenactment, dark sky tourism including star gazing, and film tourism can be developed as add-on complimentary products if proven to be cost-effective.

01 INTRODUCTION

The tourism industry is one of the main contributors to gross domestic product, employment, and growth internationally; however, it was one of the industries hit hardest by the pandemic with almost all flights reaching a halt in 2020 and all destinations announced closed (UNWTO, 2017). This document will study the tourism industry's general trends prior and post the pandemic, with the aims of highlighting the most suitable touristic products for Jordan. An in-depth analysis of the key touristic products and their subsections is conducted. At the same time, the analysis sheds light on Jordan's position pertaining to each product and sub-product. The international outlook for tourism is examined before the document illustrates the strengths, weaknesses, opportunities, and threats of each product. The document concludes with the recommended products/ experiences that will best suit Jordan in uplifting the tourism sector in the near future.

International Tourism Highlights and International Tourism Directions

In the past two years, changes and shifts have occurred in tourism. Globally, some of these changes have been brought about by the emergence of the COVID-19 pandemic, while others were the result of a shift in interest and rising awareness of certain issues, especially ecological. The current general trends and shifts that are shaping the tourism industry are highlighted below:

Easier COVID-19 requirements and procedures; more tourists

General Trends

Post COVID-19, the term "Vaccination Bubbles" has risen to depict the alleviation of quarantine requirements for countries whose nationals have received the COVID-19 vaccination (WTG, 2021). Countries permitting entry of vaccinated tourists without the need for quarantine, coupled with easier PCR protocols, are witnessing tourism surges. In Greece, the country experienced a 12% increase compared to the same period in 2019 (Forward Keys, 2021a). The correlation between the relaxed COVID-19 travel restrictions and the surge of inbound tourism has been dramatic. This was most evident in the case of Iceland. After announcing that all "all vaccinated travellers would be exempt from entry restrictions, the number of issued plane tickets soared to 158% in comparison to the equivalent week in 2019." (Forward Keys, 2021a, P:2).

According to the official Visitjordan website, Jordan still requires PCR tests even from individuals who are vaccinated and does not recognise the Chinese Sinopharm as an acceptable vaccine, although 60% of its population received it. It also still requires long quarantines with a hefty price tag from certain countries' nationals[1]. As Jordan moves forward with its vaccination plan and ahead of its September–October high season, the opportunity to capitalise on attracting more tourists from source countries with higher vaccination rates by relaxing its COVID-19 travel restrictions is demonstrably lucrative (Forward Keys 2021a).

1 https://international.visitjordan.com/MediaCenter/ShowNews/16

Virtual Reality, VR

Virtual reality is another aspect of the major tourism trends disrupting the industry, and capitalising on the technology can give an edge over rivals once adopted. Through online VR tours, customers can experience hotel interiors, restaurant interiors, outdoor tourist attractions and more, all from the comfort of their own homes.

Virtual reality, as such, allows tourists to make more sound decisions early on. This can then be the difference between customers completing a booking or backing out. VR is especially useful within the context of COVID-19, where customers may be more indecisive and need extra encouragement to press ahead with their plans (Mofokeng & Matima, 2018).

Most modern VR tours are also web-based; meaning they can be viewed through any mainstream web browser. The quality of the VR tours and the extent of immersion can then be improved further through VR headsets, which have seen a double digit increase in sales since the start of the pandemic. VR sets are a pricey gadget and thus enable reaching the higher-spending audience to influence the instigation and completion of booking associated with VR gadgets.

Much like app-stores for mobile phones, there are VR experiences stores corresponding to every VR brand. Jordan has a couple of companies specialised in VR that are of international standard[2]. As such, Jordan can build and showcase its destinations at these VR stores as means of marketing touristic products. Furthermore, it can create awareness amongst the tourism private sector and help connect them with VR companies to create pre-booking VR experiences.

Sustainable travel is a substantial requirement

According to a study conducted by booking.com with 20,000 respondents from 28 countries, conscious travel, ethical tourism, sustainable tourism, and others are among a new set of standards growing and gaining traction (Booking.com, 2020). The study found that 53% of global travellers want to travel in a more sustainable manner in the future. As a result, 69% expect the travel industry to offer more sustainable travel options in the near future. (Booking.com, 2020).

Sustainable travel includes simple changes such as the availability of carbon credits when booking a flight, or the option to rent an electric instead of a conventional vehicle. More sophisticated examples might include tourism with a volunteer element, perhaps working on a nature reserve or engaging in conservation work.

Jordan as a destination should take note of this new and growing set of requirements and plan to incorporate such options as soon as possible, working with all the stakeholders at hand from a policy to promotion implementation perspective.

[2] https://www.gov.uk/government/topical-events/jordan-growth-and-opportunity-the-london-initiative-2019/about

Localised Experiences

> **"69% of millennials want to live one-of-a-kind experiences that lets them truly get in touch with the culture of the places they visit, booking experiences or activities as part of a trip was one of the significant trends in 2018 and will continue to be one in 2019, 60% of global travellers value experiences more highly than material possessions, and in 2019, 42% of global travellers are thinking about traveling to a destination that makes them feel like a kid again."**
>
> Ascolese and Liantada (2019, p.5)

Additionally, research shows that this phenomenon is highly visible on digital tourism platforms, especially Tripadvisor, where total and percentage revenues of localised experiences are steadily growing year on year as depicted in the diagram below. Statista (2021)

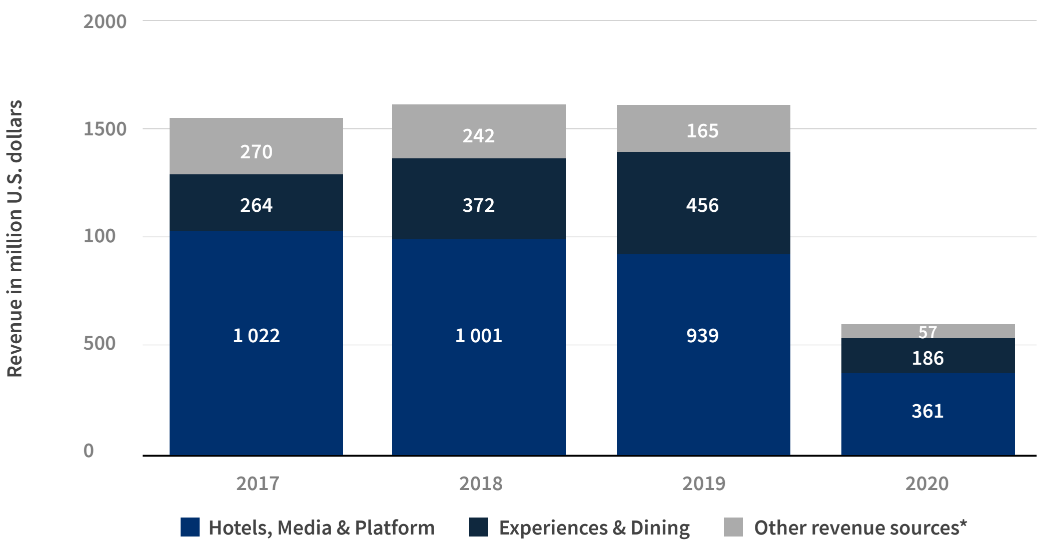


Figure 1 Trip Advisor Revenues

Jordan's experience offering is still minimal on digital tourism platforms (DTPs) with less than 100 experiences listed on Tripadvisor, Viator, and Airbnb experiences combined; the majority of which are cooking with locals and classic site-seeing tours. Given the above trend, the abundance of experiences in Jordan, and the low cost of setting up experiences and publishing them on DTPs, Jordan should consolidate efforts to revamp its experiences' scene digitally.

Solo travel means packaging experiences for one, pricing rooms with single occupancy, and providing as much information as possible about individual and bespoke experiences. Experiences in Jordan should take this solo preference into consideration and reflect it in everything from pricing to marketing and a visible focus on safety.

Solo travel is here to stay and female solo travel is substantial

The 2018 British Airways study presented at the WTO reflected that almost half of females surveyed worldwide indicated wanting to travel alone, 16% of all British women who responded to the survey are planning a solo trip soon, and 75% of women respondents from all surveyed nationalities are planning a solo trip in the next few years (British Airways, 2018). Some countries are leading the way in female solo travel: Italy, the highest, reported 63% of females aged 18-65 have completed a trip to another country alone, followed by Germany at 60% (British Airways, 2018).

In 2019, Klook's Solo Travel study polled close to 21,000 respondents across 16 markets and found that 76% of them have either traveled alone or are considering it (Klook, 2019). When comparing generational preferences, Klook (2018) found out that 80% of Generation Z (18 to 24-year-olds) respondents and 79% of Millennials (25-39) said they have already traveled alone or would be keen to plan a trip. Though one might expect younger travellers to be more adventurous, Klook (2018) reveals similar trends amongst the older generations. Roughly 73% of Generation X (40-54) and 71% of Baby Boomers (55+) said they were interested in traveling alone (Klook, 2018). There is also little difference between genders, with 74% of women and 78% of men saying they have either already experienced or would be interested in pursuing solo travel (Klook, 2018).

Solo travel as a substantial trend means packaging experiences for one; pricing rooms with single occupancy; and providing as much information as possible about individual and bespoke experiences to meet this surge. Experiences in Jordan should take this solo preference into consideration and reflect it in everything from pricing to marketing, with a visible focus on safety.

Workcation and the Digital Nomad

With lockdowns in place due to the pandemic, remote work became the new norm. This mode of work inspired the "workcation", which is combining remote work with a vacation. Workcation hot spots seem to follow time zones proximity and have instigated a substantial increase in longer stays (Forward Keys, 2021b). Forward Keys, (2021b) indicates that North and Western Europeans have visited Southern European destinations for 12.27 days on average in 2021, compared to 8.1 days in 2019, constituting 30.9% of the tickets compared to 14.8%. This change is attributed to remote working while on vacation (defining short stays as 1-13 days and long stays as 14+ days). The study shows that the same can be seen in tickets issued to the Canary Islands from the US in the period Jan–Feb 2021 compared to Jan–Feb 2019 with long stays up by 10% and one way tickets up by 9%. So much so that the Canary Islands will launch a dedicated campaign to attract worckationers and digital nomads (workers working without a base country as a lifestyle and not just a temporary arrangement) (Kassam, 2020).

The trend of remote work is here to stay with hybrid models of remote work persisting after the pandemic, mostly for a highly educated, well-paid minority of workers from the developed world (McKinsey and Company, 2020). Upwork (2020) notes that by 2025, 36.2 million Americans will be working remotely compared to 16.8 million prior to COVID-19. Gartner (2020) surveyed 127 corporate policy makers and found that 82% of companies would allow workers to work remotely some of the time.

> **Governments across the world are already reacting to this trend, and issuing digital nomad visas to respond to the grey area between a work visa and a vacation visa.**

Governments across the world are already reacting to this trend, and issuing digital nomad visas to respond to the grey area between a work visa and a vacation visa. According to the European Travel Information and Authorization System website (ETIAS, 2021), the following countries have actually started issuing digital nomad visas in Europe (Croatia, Czech Republic, Estonia, Germany, Greece, Iceland, Italy, Portugal, and Norway) and internationally (Anguilla, Antigua & Barbuda, Australia, Barbados, Bermuda, Cayman Islands, Colombia, Costa Rica, Curaçao, Dominica, Dubai (UAE), Georgia, Indonesia, Mexico, Mauritius, and Thailand).

Jordan has a solid digital and workspace-sharing infrastructure with competitive costs; however, it is centralised in Amman and five-star hotels' business centers elsewhere. The country offers a variety of attractions within driving proximity of these infrastructures, whether in Amman co-working spaces or the business centers in the hotels of Aqaba, Petra, and the Dead Sea, that can be attractive for digital nomads and worckationers.

Nonetheless, visa regulations are yet to catch up with the target audience as they should. Moreover, the tourism private sector should be made aware of the trend so that longer stay packages, shared work spaces, and other perks can be made available to lure in the emerging market of worckationers and digital nomads.

Finally, marketing to workationers should highlight internet speed, business or data centers, and work space for hire. Additionally, rather than marketing through conventional and/or social media, it is recommended to connect or package offers to industry leaders with tens of thousands of active members like Wifi Tribe and Nomad List.

02 TOURISTIC PRODUCTS' TRENDS & HIGHLIGHTS

The general highlighted trends found through the thorough research, especially in regards to changes imposed by the COVID-19 pandemic, can be segregated into several “touristic products” as is reflected below.

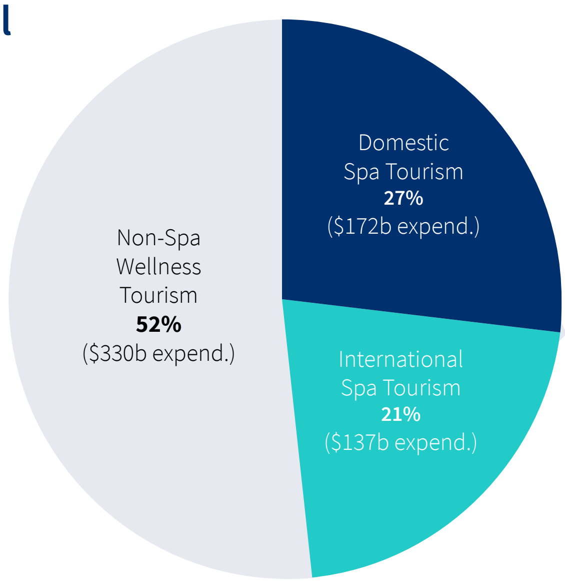
Wellness Tourism

Reactive	Proactive
Medical Tourism	**Wellness Tourism**
Travel to receive treatment for a diagnosed disease, ailment, or condition, or to seek enhancement.	Travel to maintain, manage, or improve health and wellbeing.
Motivated by desire for lower cost or care, higher quality care, better access to care, and/ or care not available at home.	Motivated by desire for healthy living, disease prevention, stress reduction, management of poor lifestyle habits, and/or authentic experiences.
Activities are reactive to illnesses, medically necessary, invasive, and/or overseen by a doctor.	Activities are proactive, voluntary, non-invasive, and non-medical in nature.

Source: Global Wellness Institute, Global Wellness Tourism Economy, November 2018

Figure 2 GWI Comparison between Wellness and Medical Tourism

Spa tourism represents about 48% of Global Wellness Tourism Expenditures



Source: Global Wellness Institute, Global Wellness Tourism Economy, November 2018

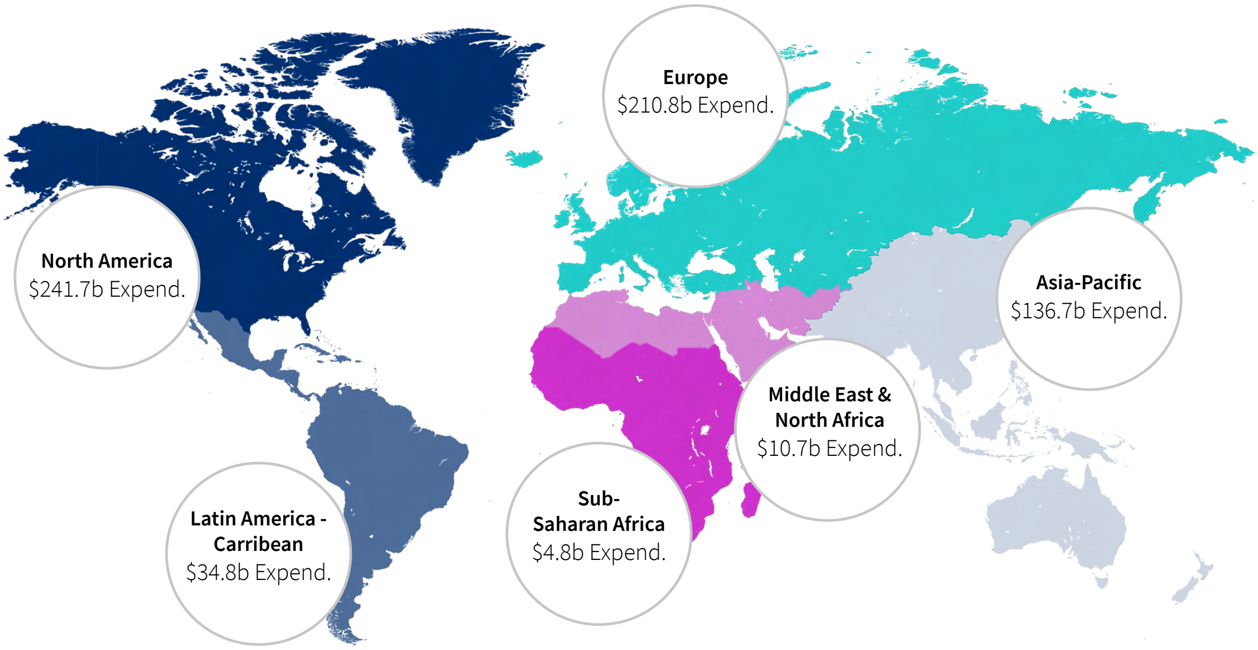
Figure 3 3.48% of wellness tourism expenditure is spa tourism

The Global Wellness Institute, GWI, summarizes the differences between wellness and medical tourism coherently in Figure 2 above[3]. GWI defines wellness tourism to include healthy eating and fitness (detox, weight loss, and other dietary camps, gym visits, training programs), spa and beauty (massage, bathing, body treatments, facials, hair and nails), mind and body, spiritual and emotional retreats (yoga, meditation, tai chi, qigong, bio feedback, lifestyle retreats and wellness retreats), as well as eco and adventure tourism (hiking, biking, nature walks, and nature preserve visits). The grouping of all the above activities into a single product offering as defined by the Global Wellness Institute will not be employed by this project. Instead, the project's grouping will be as follows: adventure and nature tourism under ecotourism; yoga, meditation, and spa under wellness tourism; and cultural and spiritual tourism as two standalone products.

Wellness tourism as a whole was found to be worth 639$ billion in expenditure, 48% of which is in spa tourism as per GWI (2018) and Figure 3 below. It should be highlighted that these numbers include both types of tourists: those who rate wellness activities as the primary purpose for their visit and those who rate them as secondary.

[3] Open source policy on GWI website

GWI (2020) estimates the total amount spent on spas, bathing, fitness, meditation, and life coaching in 2017 to be 99.7 billion dollars. GWI further indicates that primary wellness tourists spent 53% and 178% more than the average international and domestic tourists respectively in 2017. Figure 4 below depicts the global percentage share of wellness tourism in terms of expenditure and trips, with Europe leading the way in number of trips, with 292 million trips in 2017, and North America leading in expenditure with 241.7$ billion dollars spent. The same study predicted global annual growth in wellness tourism between 2017–2022 to be 7.5% while average annual growth in the industry in the Middle East and North Africa to be 11.8%.



Source: Global Wellness Institute, Global Wellness Economy Monitor, October 2018

Figure 4 Global Wellness Tourism Distribution by Region, 2017
Number of wellness tourism trips and expenditures (inbound and domestic)

On a more specific front, Wayne and Russel (2020) highlight the top ten destinations worldwide for global wellness to be as is indicated in Figure 5.

According to GWI (2018c), and specifically in regards to Jordan, the country received 307.9 thousand international wellness tourists and 157.4 thousand domestic wellness tourists in 2017, spending 604.3$ million dollars. This number should be taken as an indication only as this includes adventure tourism as well as visits and lodging in ecological reserves. Moreover, it is highly unlikely that data pertaining to meditation, yoga, and spas can be aggregated from Jordan. Furthermore, this figure does not highlight how many of the visitors were primary or secondary wellness visitors.

Global Wellness Destinations
1. Bali, Indonesia
2. Rishikesh, India
3. Sedona, Arizona, United States
4. Hepburn Springs, Australia
5. Ko Samui, Thailand
6. Costa Rica
7. Goa, India
8. Zermatt, Switzerland
9. Maldives
10. Ibiza, Spain

Figure 5 Highlights the top ten wellness destinations in the US and worldwide

Spa Tourism

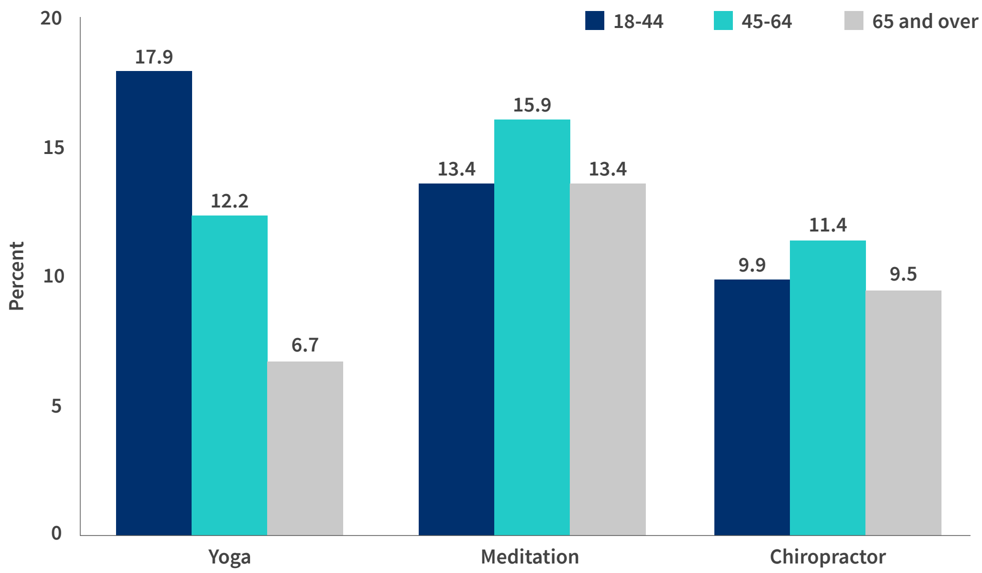
It is evident that the wellness tourism market, especially the spa tourism section accounting for almost half of the market share, is a substantial industry in any touristic product development endeavour. Europe and North America lead the way with more than half of wellness trips and expenditure worldwide, and they are an already-established source for inbound tourism to Jordan. As such, it is recommended to tap into the wellness tourism as a whole for Jordan and especially the spa tourism subsector.

However, at present, Jordan's spa tourism product offering has major gaps. First, the offers are either luxurious in five-star hotel spas, specifically those in West Amman, or a substandard offer like the offering of Burbaitah and Al Hima Al Shamaleyeh. This gap limits the target audiences that can be attracted and narrows them down to the affluent few who can pay the hefty price tag. The second gap is the absence of a packaged wellness and/or spa retreat package on its own, where spa visits are sold as an optional/complementary product to an existing itinerary. The third gap is in human resources, where there is, to date, no institute responsible for spa professionals (non-beauty treatment training). This resource pool needs to be built for this product to become successful. Finally, the fourth gap is in authenticity as none of the Jordanian spas assessed showed any use of traditional products or traditional massages and are confined within Swedish, Thai, Moroccan, and Turkish themes.

Yoga and meditation are one of the fastest growing practices in the US and Europe.

Yoga and meditation tourism

Yoga and meditation are one of the fastest growing practices in the US and Europe. The US National Center for Health Statistics, NCHS, defines yoga as "a combination of breathing exercises, meditation, and physical postures, of Hindu origin, used to achieve a state of relaxation and balance of mind, body, and spirit" and meditation as "the act of engaging in mental exercise to reach a heightened level of spiritual awareness or mindfulness." (NCCIH, 2018, P5). NCCIH reported increases from 2012 to 2017 in Americans practicing yoga (9.5% to 14.3% of the total adult population) and meditation (4.1% to 12.4% of the total adult population). NCCIH also highlights that in the US, women are more likely than men to practise yoga, estimated at (19.8% compared to 8.6%) and meditation, estimated at (11.1% compared to 9.4%). Demographically, the use of yoga was found to be highest among adults aged 18–44 (17.9%) and decreased with increasing age (depicted in Figure 6 below). Adults practising yoga aged 18–44 were more than twice as many compared to adults aged 65 and over (6.7%); for meditation however, the practice was higher among adults aged 45–64 (15.9%) compared with those aged 18–44 and 65 and over (13.4% each), (NCCIH, 2018).



Source: NCHS, National Health Interview Survey, 2017.

Figure 6 Percentage of adults who used yoga, meditation, or a chiropractor during the past 12 months

Allied Market Research, AMR, found that the yoga and pilates market in Europe was valued at $26.9 billion in 2021; it is estimated to reach $49.4 billion in 2027 with a 13.05% compound aggregate growth rate, CAGR; Germany accounted for nearly 20% of the value in 2019; and the UK had the highest CAGR of 14% (AMR, 2021). In 2019, between yoga classes, pilates classes, merchandise sales, and instructor accreditation, the yoga classes segment accounted for nearly half of the European market value with a contribution of $13.4 billion (AMR, 2021).

On a more specific level, one of the leading yoga retreats websites, https://yoga.goenjoy.life/, subsequently referred to as YGL, published a study analysing 20,000 yoga and meditation retreats found in Google Places, Trip Advisor, Facebook events, and various yoga retreat booking sites and found some helpful insights into the yoga and meditation tourism industry. YGL (2020) found that the highest number of yoga retreats are in Europe and around the equator (apart from Africa) as depicted in Figure 7, plotting the yoga retreats geographically.

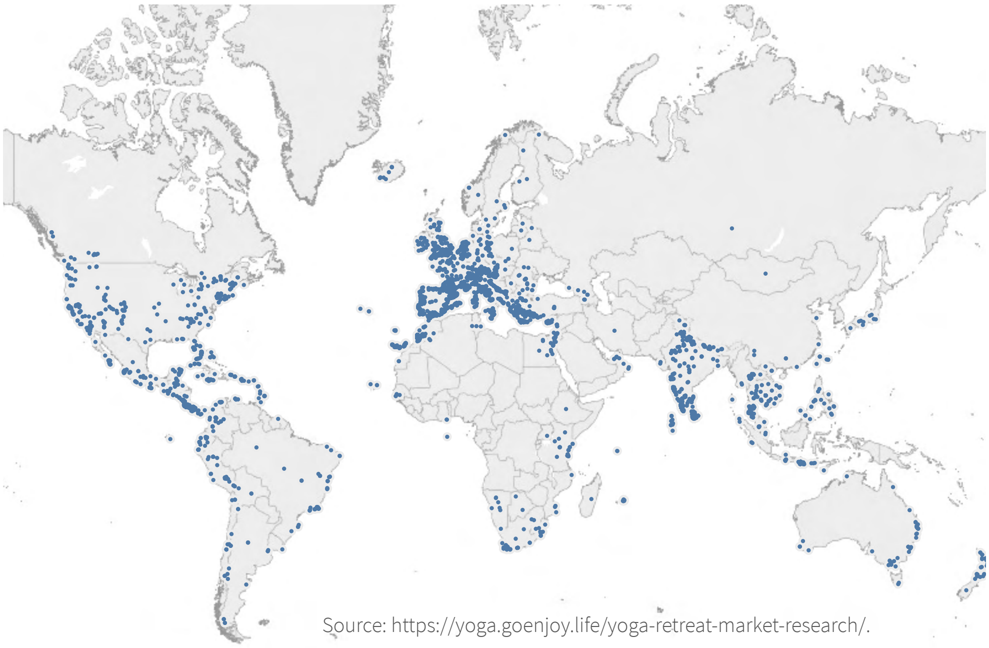


Figure 7 Yoga retreats plotted geographically

Figure 8, on the other hand, plots yoga retreats geographically against average prices per night, where it is reflected that the average pricing by country varied drastically ranging from $38 to $200 per person per night. YGL (2020)

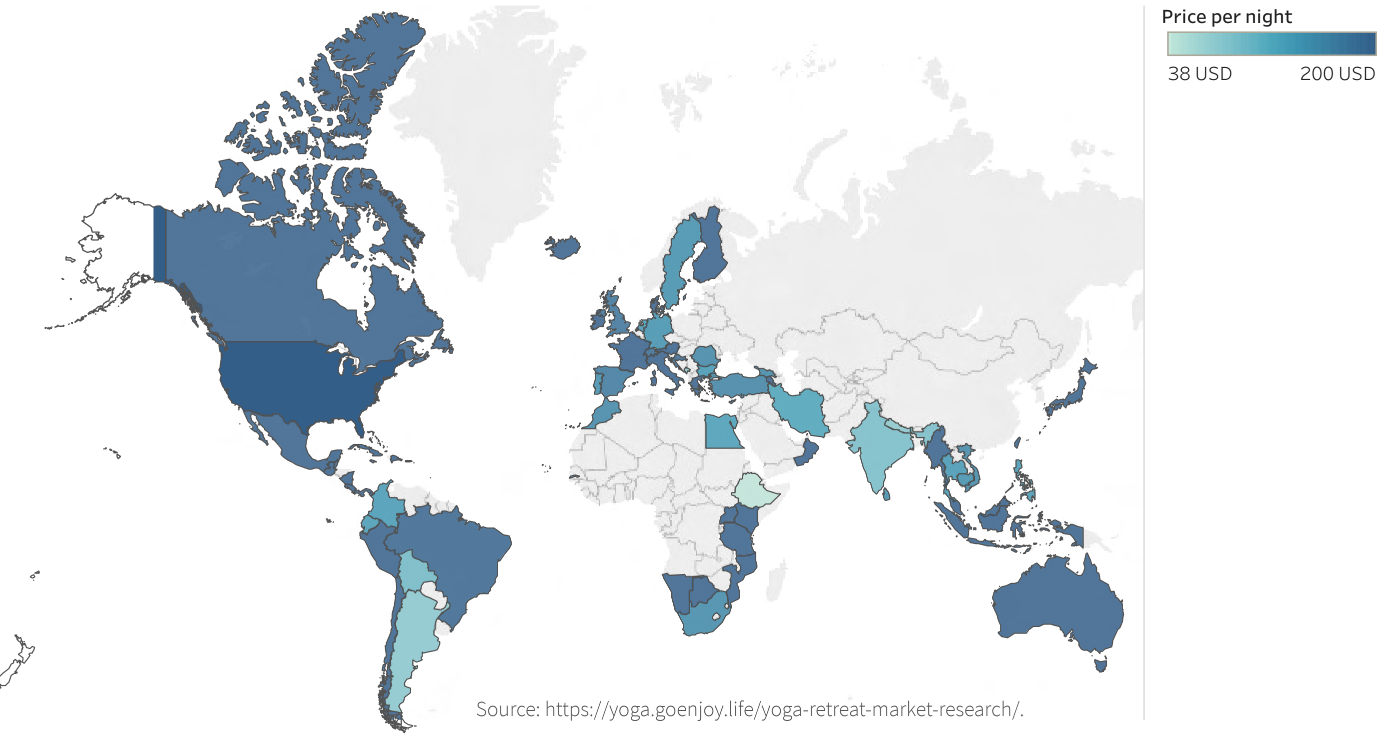


Figure 8 Yoga retreats price per night geographically

In terms of duration, YGL also found that the mean duration of days per yoga retreats was seven; the majority of retreats extended between 3 and 8 days; and the most extended durations are for instructor training courses in India. Figure 9 below plots the durations of retreats in terms of occurrences.

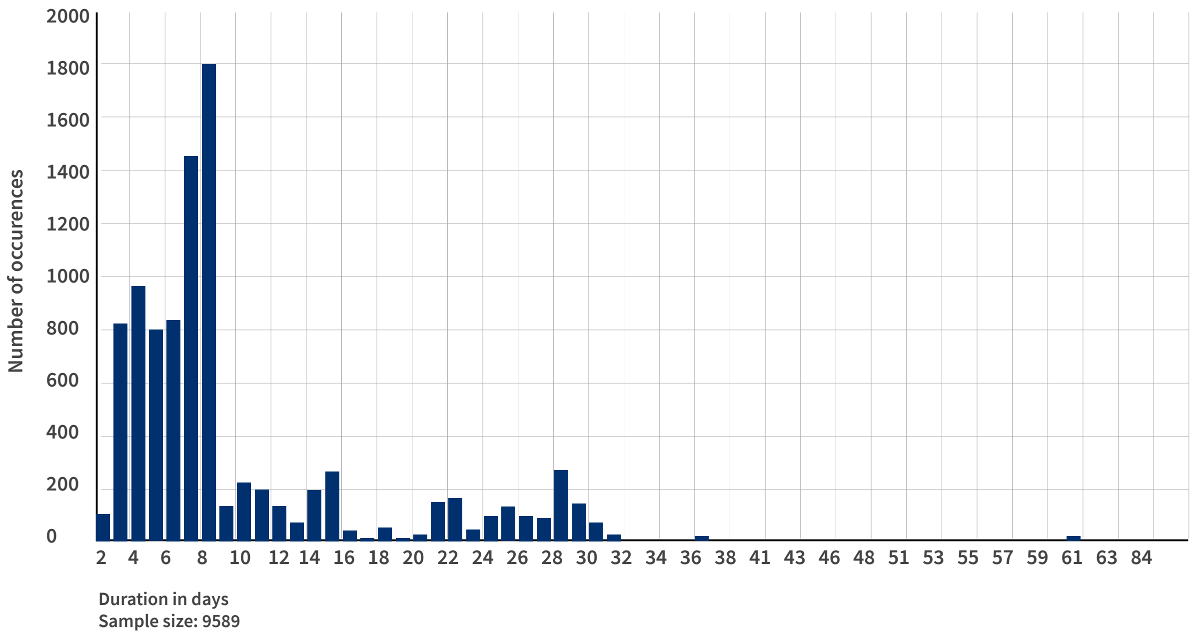


Figure 9 Plots the durations of retreats in terms of occurrences

A very intriguing case is that of India, where although it was only ranked seventh as a destination for wellness tourism in 2017 (GWI, 2018c), it is the fastest growing tourism market in the world with an estimated 22% annual growth rate (Wayne and Russel, 2020). The government has taken the sector as a strategic industry, employing 3.8 million Indians directly responsible for 56 million tourists by dedicating a ministry (Ministry of AYUSH[4]) for yoga and Ayurveda amongst other wellness traditions (Wayne and Russel, 2020). Earlier in 2015, the Indian Ministry of Ayush issued financial assistance for the promotion of wellness as niche tourism products, which offers Marketing Development Assistance (MDA) schemes and financial assistance to accredited providers (Wayne and Russel, 2020). The types of support included 50% financing for publicity and promotional materials; financial assistance for organising workshops/events/meets/seminars on promotion of wellness and medical tourism for 100+ participants, at least half of whom are non-Indian; financial assistance for shows with exhibits, suppliers, and buyers linkages for the promotion of wellness and medical tourism for 75+ participants, 40% of whom are non-Indian buyers; and financial support for training courses on skills development and certification courses in the wellness and medical tourism sectors (Wayne and Russel, 2020).

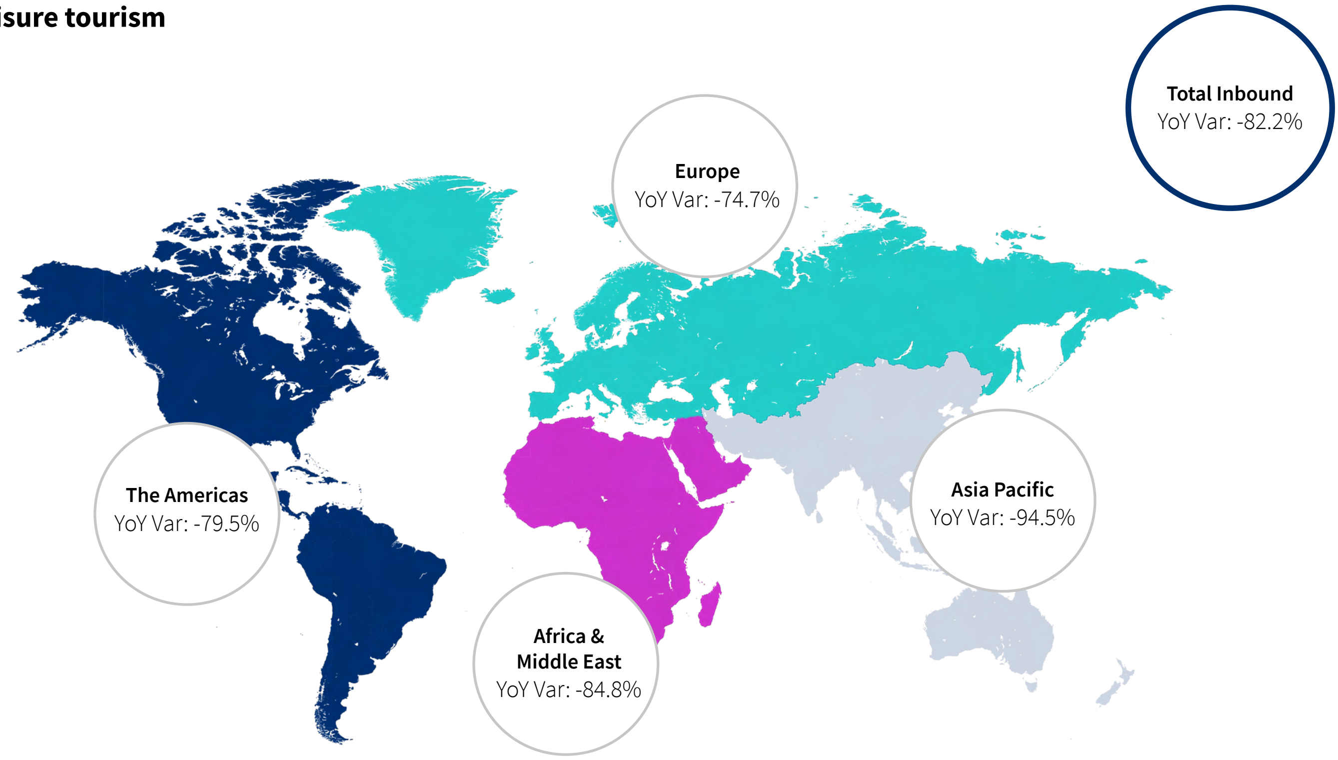
[4] Government of India website for Ministry of Ayush: https://main.ayush.gov.in/

Jordan has an abundance of natural sites appropriate for yoga and meditation and a growing instructor and practitioner crowd. It would be a quick win to connect tour operators with Jordanian yoga instructors to package already existing yoga classes and retreats to international visitors on the international retreat sites they are most familiar with.

The research thus concludes that wellness tourism is a substantial tourism market; that yoga and meditation practices are gaining substantial popularity; and the forecast ahead is only positive. Jordan has to take notice, and there might be an inherited advantage from its heritage, specifically when referring to the Stylite Sect. The Stylite or Stylitic sect is Christian-based and is primarily built on worshippers meditating in a pillar for this purpose. Home to this sect was UNESCO world heritage site in Jordan: Umm Al Rasas (Warwick, 2000). Jordan can use this heritage to promote the revival of a meditation site with spiritual connections.

Furthermore, Jordan has an abundance of natural sites appropriate for yoga and meditation and a growing instructor and practitioner crowd. Yoga and meditation are popular amongst all religious groups including the non-religious, atheists, and agnostics (PEW, 2018). Culturally, Jordanians need to be aware of this to alleviate any negative sensitivities. Finally, a search on leading yoga retreat booking sites found only a few yoga retreats in Jordan, all of which are conducted by non-Jordanian instructors. It would be a quick win to connect tour operators with Jordanian yoga instructors to package already existing yoga classes and retreats to international visitors on the international retreat sites they are most familiar with.

Leisure tourism



Source: ForwardKeys

Figure 10 Q3 and Q4 international arrivals comparison between 2019 and 2020
1 July to 30 September 2020; Year-on-Year variations by region

Forward Keys, FK, a specialised tourism research center, found that quarters three and four of 2020 show that Europe is being hit the least in terms of international tourism arrivals (FK, 2020) as is illustrated in Figure 10 above.

For the second year in a row, post COVID-19, Southern European cities are the most resilient tourist destinations (depicted in figure 11 below), showing the least amount of variance between Q3 and Q4 of 2021 compared to the same period in 2019 (FK, 2021). The most determining factor for decreasing the variance between 2019 and 2021 has been the lifting of COVID-19 travel restrictions and welcoming of vaccinated tourists (FK, 2021). There are two determining factors of tourism destination resilience according to Forward Keys (2021): being a leisure destination and having what is termed as a vaccination bubble between the destination and source tourism countries (i.e. countries with higher vaccination rates for its citizens traveled more for leisure to other countries with high rates of vaccination.)

Top resilient cities	YoY variation
1. Heraklion (GR)	-30.9%
2. Thessaloniki (GR)	-36.9%
3. Palma Mallorca (ES)	-49.6%
4. Split (HR)	-50.1%
5. Faro (PT)	-51.5%
6. Porto (PT)	-55.0%
7. Athens (GR)	-59.6%
8. Malaga (ES)	-62.8%
9. Lisbon (PT)	-64.9%
10. Warsaw (PL)	-68.5%

Source: ForwardKeys

Jordan's leisure tourism away from cultural and ecotourism as a product offering is in its infancy and has a long way culturally before it can seize this opportunity. Thus, although it has eased its travel restrictions and has achieved a substantial vaccination percentage of its adult population, leisure tourists did not flock to the country as seen in Iceland and Greece. Vujicic (2020) found that nightlife was a key motivator for the younger demographic pursuing leisure travel. Culturally, nightlife service provision is still not very acceptable, and with the gap in nightlife, Jordan loses the younger market. The current hotels in leisure destinations Aqaba and the Dead Sea are not specialised in long stays nor in targeting retirees as they lack the specific amenities and services to attract Western target markets, such as the ones in Florida, Greece, Spain and Italy. Respectively, the grey-haired leisure target market is also lost, apart from leisure as a complementary product to cultural tourism itineraries. With the lack of nightlife and retirement homes, this leaves the culturally similar GCC family and female travellers[5] as a potential target market that seeks leisure as the niche target audience.

Figure 11 Top 10 Resilient Destination Cities* by tickets issued during Q3 2020
Tickets for international travel issued between 1 July and 30 September; 2020 vs 2019 volumes

***Out of cities with a share of at least 1.0% of arrivals in EU & UK cities**

5 Male GCC travelers were omitted as they seek similar night life product offering to the Western market.

Ecotourism

Wood (2002) indicates that nature tourism comprises ecotourism and adventure tourism with links to cultural and rural tourism. The Global Ecotourism Network, GEN, defines ecotourism as “responsible travel to natural areas that conserves the environment, sustains the wellbeing of the local people, and creates knowledge and understanding through interpretation and education of all involved (visitors, staff and the visited)” (GEN, 2021). Ecotourists are mainly interested in relatively undisturbed ecosystems and want to learn more about natural phenomena, with the aim of contributing to the sustainable development of natural sites (Shi et al., 2019). Accordingly, and based on an extensive examination of literature addressing the most popular activities for ecotourists, it was found that the following are in highest demand: photography and landscape painting, studying the flora and fauna, cultural sightseeing, and special guided hikes (Constantin et al., 2021).

AMR (2021b) estimates the international ecotourism market value at $181 billion in 2019 and expects it to grow to $333.8 billion by 2027; that Iceland, Nepal, Kenya and Palau are the newest destination hotspots; that in 2018, Nepal and Kenya enjoyed the highest growth in number of tourists by 24% crossing 1 million ecotourists and 37% crossing the 2 million mark, respectively; and finally, that North America will have the highest compound annual growth rate, CAGR, forecasted at 16.2% between years 2021–2027. The same study has

Jordan may benefit the most from packaging an ecotourism product along with two subsections of ecotourism, birdwatching and dark sky tourism to have a stronger product

also found that group travellers still compose the majority of ecotourists. Ecotourist solo travel, nonetheless, is estimated to grow by 15.9% in the years 2021–2027. In terms of age groups, the age group between 30–40 years old constitutes the majority of ecotourists, and the age group between 20–30 is expected to exhibit the highest growth rate between 2021–2027 estimated at 15.6% CAGR (AMR, 2021b). Lastly, travel agents still dominate the ecotourism market as the main sales channel, compared to direct booking and are expected to continue to grow, outpacing direct booking in the years 2021–2027 (AMR, 2021b).

Even with its high growing pace, ecotourism is still a niche market, estimated to compose between 5–7% of all international tourists. However, many countries have concentrated their efforts on nature protected areas and achieved good results within this market (AMR, 2021b). As such, Jordan may potentially benefit from the nature reserves within the existing hospitality infrastructure; penetrating this market, nonetheless, should be based on the fact that the infrastructure in question is built to avoid mass tourism and its negative effects on the environment (RSCN,2019). The Royal Society for the Conservation of Nature in Jordan indicates that visitors of nature reserves in Jordan in 2019 were 196,663 visitors, more than half of whom visited the Ajloun and Dibeen reserves. It is not indicated how many of the visitors stayed overnight and how many were day visits and how many were domestic versus international tourists. In total, revenue from ecotourism was stated at 2 million JODs, JD1.5m of which was from entrance fees and accommodation, JD0.43m from food and beverage (including the Amman Wild Jordan café), and JD57 thousand as other revenues. Given the 196 thousand visitors, this brings the average spending per visitor on entrance and accommodation to 7 JODs, which is a very low average spending rate. Nonetheless, there is a good base, accumulated knowledge, and brand to build upon to increase capacity, footfall, and average spending.

Thus, while this niche market may prove lucrative, the current capacity estimated in the tens of rooms available still presents a glass ceiling, and needs to be addressed when choosing ecotourism as a product for the purposes of this project. That being said, Jordan may benefit the most from packaging an ecotourism product along with two subsections of ecotourism: birdwatching and dark sky tourism to have a stronger product, as this research will reflect.

Birdwatching

Randler et al. (2020) defines birding or birdwatching as the practice of observing birds based on visual and acoustic cues. A survey conducted in 2016 by the U.S. Fish and Wildlife Service; U.S. Census Bureau, hereafter referred to as USFWS, found out that 45.1 million Americans observed birds, of whom 38.7 million observed birds around their homes and 16.3 million observed birds on trips. USFWS (2016) illustrates that the average birder spent 16 days watching birds per year.

The Netherlands Ministry of Foreign Affairs Centre for the Promotion of Imports from developing countries (CBI) published a market research for birdwatching in July 2021 considered among the latest and most extensive on the topic. CBI (2021) illustrates that around three million international trips are done each year for the purpose of birdwatching, and that birdwatching tourism has been a rapidly growing market, with the largest share coming from Europe. At least 20% of European travellers that engage in wildlife tourism are interested in birdwatching activities, and this is expected to increase when COVID-19 imposed travel restrictions are lifted due to the fact that birdwatching happens in open air (CBI, 2021).

In terms of tour operators, CBI (2021) illustrates that 37% of all European tour operators offer birdwatching tourism for casual birders, who prefer to go on organised tours. However, although the birdwatching market is growing, most tour operators in Europe consider birdwatching tourism as a sub-category of wildlife tourism or ecotourism, and do not provide trips dedicated to birding specifically but rather consider it as a potential activity within a larger package.

“Jordan is a great destination for bird lovers and dedicated birdwatchers. Its remarkable variety of habitats, from rugged mountains and evergreen woodlands to scrubby steppe, hot dry deserts and the subtropical Jordan valley, provide the perfect environments for many species of indigenous birds.”

(JTB, 2021, p6)

Africa and the United States are popular destinations for European and non-European birdwatchers, while Asia and South America are relatively new destinations for birdwatchers but are experiencing rapid growth (CBI, 2021). Post COVID-19, birdwatching tourism was observed to stop internationally and increase in duration and number of visits domestically (Randler et al., 2020). CBI (2021) attributes this to the average birdwatcher being 50 years and older and as such more likely to be risk averse when it comes to international flights given health risks and concerns.

In Jordan, the Royal Society for the Conservation of Nature, RSCN, and Birdlife International, conducted a project funded by the Global Environment Facility, GEF, and supported by the UNDP with the aim of "conservation of migratory soaring birds among different sectors (waste management, hunting, energy, agriculture and tourism) across the Rift Valley flyway that is the second most important flyway in the world for soaring birds." (JTB, 2021; P23). One of the results of the project was the creation of the first and most extensive birdwatching brochure for Jordan, published on the Visit Jordan's official website for the promotion of tourism to Jordan.

JTB (2021) highlights Jordan's birdwatching uniqueness in that it is located at the crossroad of Europe, Asia and Africa meaning that migrating birds funnel through the rift valley from these three continents and can sometimes be seen together in the same general area,

making the Jordan Rift Valley an important location for soaring birds. Furthermore, “Jordan is a great destination for bird lovers and dedicated birdwatchers. Its remarkable variety of habitats, from rugged mountains and evergreen woodlands to scrubby steppe, hot dry deserts and the subtropical Jordan valley, provide the perfect environments for many species of indigenous birds.” (JTB, 2021, p6).

More than 435 species of birds have been recorded in Jordan, of which around 70 are resident, 21 are migrant and present during the non-breeding season, and almost 350 are migratory, passing through between their breeding and non-breeding grounds with some of these migrant birds ending their migration journey in Jordan to breed (JTB, 2021). Seasonally, two different migration periods can be distinguished: spring and autumn. This follows the same high seasons for Jordan tourism from Western countries, busiest between September–October and March–April (JTB, 2021). This makes this unique product offering a very strong standalone or add-on product, especially for the markets of Germany, UK, Netherlands and the US, which have the highest number of birdwatchers globally (CBI, 2021).

In conclusion, although birdwatching is a niche form of ecotourism, Jordan presents a very strong stand in bird migration worldwide given its central location between three continents. As such, it is recommended that birdwatching is adopted for this and any tourism-product development project bearing in mind the unparalleled competitive advantage in the product uniqueness (JTB, 2021). Finally, nature tourism and birdwatching in particular was deemed the most logical to make the fastest recovery after COVID-19 given its open air and small groups nature (Randler et al., 2020). When it does, Jordan has much to gain for targeting this niche market.

Dark Sky Tourism (DST)

One of the main results of urbanisation is the exposure to the emission of blue light from home and city lights, which causes disturbance in the release of the sleep hormone melatonin; this in turn interrupts the circadian clock causing sleep distress, anxiety, and possibly depression (Cinzano et al. 2001). This direct effect of city night light to sleep distress, anxiety, and depression has led to a growing interest in decreasing light pollution, designating dark sky protected areas (commonly as dual designation in a nature protected area), establishing civil society organisations advocating for the topic, and developing a very early touristic product based around tourists visiting a site with the main purpose of observing the night sky without exposure to light pollution (Labuda et al., 2016).

At a more specific front, the United Nations Educational, Scientific, and Cultural Organization, UNESCO, started an initiative in 2004 linking the science of astronomy and the cultural heritage pertaining to it from one side with the sites of astronomy observation from the other resulting in the concept of Astrotourism (Ruggles, 2021). Astrotourism is defined as active observation of the sky using equipment and/or guided tours, while dark sky tourism is a simpler observation of the natural night sky without light pollution. For the sake of the project and given the lack of literature for both activities, they will be considered as one. (Cinzano et al. 2001)

Ruggles (2021) notes that the astronomy observation sites designated as part of the world heritage have not been attracting tourists or gaining significant tractions yet and are still considered part of the wider umbrella of nature tourism. However, Labuda et al. (2016) argues that dark sky parks are one of the important measures for sustainable tourism and supporting nature tourism and should be evaluated as a more substantial component. According to the International Dark Sky association[6], the body that accredits dark sky protected areas and the only one with a set of rules and guidelines, there are 63 dark sky protected areas in North America, 11 in Europe, submitted applications for 2 sites in Latin America, 2 in Asia, and none in Africa. (Luginbuhl et al., 2006).

> **The combination of an abundance of clear skies and nature protected areas generally following dark sky tourism requirements present an opportunity for Jordan to apply for the international dark sky association, to enable the nature protected areas a dual designation as a dark sky protected area.**

[6] As published on their website: https://www.darksky.org/

Jordan enjoys 225 days of sunlight – depicted in Figure 12 below – and relatively pollution-free skies (Al Rawashed, 2018). The Royal Society for the Conservation of Nature, RSCN, is the body designating and managing nature reserves in Jordan, following international standards of keeping light pollution to a minimum albeit for the reason of not disturbing the natural life (RSCN, 2019). The combination of an abundance of clear skies and nature-protected areas generally following dark sky tourism requirements presents an opportunity to apply for the international dark sky association to enable the nature-protected areas a dual designation as a dark sky protected area. The existence of these areas, paralleled with Jordan's Nabateans' contribution to astronomy, astrology, and navigation (Al Manakh[7]), may put the country at a position to apply for the UNESCO astronomy observation traditions and sites. Al Nawafleh (2006)

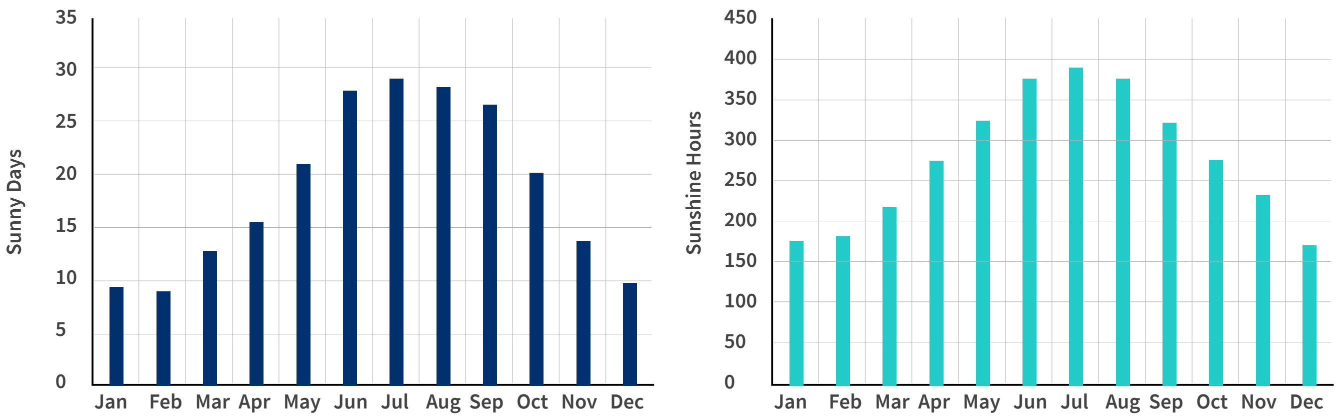


Figure 12 Sunny days and hours in Jordan

In conclusion, the benefits or size of dark sky tourism could not be drawn due to lack of monetary data on the size of the dark sky tourism market; however, the cost of applying for Jordan is negligible. Finally, the link between the Nabatean archeology used to observe and study astronomy and the dark skies in Jordan could be an interesting add-on touristic experience to a larger touristic one, especially since Jordan enjoys clear skies most of the year.

[7] A Nabatean word now defined in English as Almanac as the "annual calendar containing important dates and statistical information such as astronomical data and tide tables" citing Oxford dictionary online

Agritourism

Agritourism, also known as agrotourism, farm tourism, or agricultural tourism is a subsection of ecotourism combining farming activities with educational and entertainment activities attractive for tourists (AMR, 2021c). It is difficult to measure agritourism without including elements of rural tourism, gastrotourism, birdwatching, and agricultural museum visitors, but the highest estimate with such elements combined was found to be valued at $29 billion in 2019, with an expected compound aggregate growth rate of 13.1%, estimated to reach $42 billion in 2027 (AMR, 2021c). This valuation and estimate should be taken as an indication, since on-farm sales are part of the valuation and make up over 57% of the revenues generated (AMR, 2021c), which raises the question of whether the main purpose of the touristic visit was tourism or purchasing the agricultural product directly from the site. However, this niche and growing touristic product holds immense benefits for farmers specifically and rural development more generally. While no documented evaluation of the economic multiplier effect was found, it is thought to be high given the nature of the services provided at farms in remote locations, that are otherwise not likely to receive this level of income. Jordan could benefit from this form of tourism given it aligns with its efforts to decentralise economic development and directly counteract poverty and unemployment. For the scope of this project, the current lack of experience and extensive capacity building required only qualifies agritourism as an add-on product offering within a larger ecotourism product.

Cultural Heritage Tourism

The World Tourism Organization (UNWTO) defines cultural tourism as “a type of tourism activity in which the visitor’s essential motivation is to learn, discover, experience, and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual, and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries, and the living cultures with their lifestyles, value systems, beliefs and traditions”. (UNWTO 2017, P.11)

According to UNWTO, the reported average of tourists primarily visiting for cultural purposes as a percentage from all tourists for the year 2014 was 35.8% based on the tourism data from responding member countries. The organization notes that when analysing the responses of member states in 2014, there is a very important distinction between tourists with the motivation of cultural tourism, found at 16% of all tourists, and tourists participating in cultural activities while on vacation, estimated at 47% of all tourists. UNWTO also reports that the average annual growth rate for cultural tourism was found at 4.5% per annum for 2013 to 2018, while global tourism had a lower 3.9% growth rate for

It is safe to speculate that cultural tourism is the main motivator for tourists in Jordan. As such, it is recommended that cultural tourism is inevitably selected for this project and any Jordanian tourism product development, given the size of the international market and Jordan's track record in this product.

those same years, providing concrete support to the general idea that cultural tourism is growing at a slightly faster rate than tourism in general. Finally, 93% of responding member states' governments of UNWTO saw that growth in cultural tourism would continue for at least five years post 2018 (UNWTO, 2018). It is worth noting that no data post COVID-19 substantiating the growth rate was found.

Cultural tourism has specifically been incorporated in tourism policies worldwide. The same study by UNWTO found that 90% of responding countries stated that cultural tourism is part of their tourism policy, and 69% reported it as overwhelmingly important, while 95% found cultural tourism within their policy to be important, even for those who have not incorporated it yet. Finally, 85% of responding countries stated that cultural tourism is part of their tourism marketing material, and that product development and marketing are their priorities for the future of cultural tourism. (UNWTO, 2018)

Cultural tourism has moved from the niche affluent to the masses between 2005 and 2015 (Richards, 2018). This is also reflected in UNESCO (2021), which states that over the past decade, the number of museums has increased by 60%. The subsector, nonetheless, especially as a mass tourism product, was hit hard by the COVID-19 pandemic, with its social distancing and public space closures that automatically resulted in the closure of 90% of museums and 80% of heritage sites during 2020. As a response, cultural institutes took refuge in digitisation. This can be best seen in museums where the Network of European Museum Organizations (NEMO) released the results of a survey of 6,000 museums from 48 countries, from which 93% of museums reported that they have increased or initiated online services during the pandemic. UNESCO recommends digitisation of cultural assets on the path to recovery from COVID-19 repercussions, stressing that the pandemic has reasserted the human need for culture. The Louvre in France, for instance, has witnessed a ten-fold increase in traffic to its website during the lockdown months of the pandemic. (UNESCO, 2021).

In Jordan, the Ministry of Tourism and Antiquities announced that the drop in tourists' entries to the cultural museums is at 65.8%, compared to the national average drop of 71.6% for the whole national tourism sector, reflecting a slight sign of resilience for cultural tourism. No new digitisation efforts were found when surveying all Jordanian museum websites. (MOTA, 2021)

Thus, it is safe to conclude that cultural tourism is a substantial segment of international tourism, both as a primary motivator for tourism and as a touristic activity during the visits for almost half of tourists worldwide (OECD, 2009). Furthermore, it has been apparent that the cultural tourism market is competitive with governments around the globe, having a policy put in place to take advantage of this growing important market.

Finally, while there is no literature on the segment of tourists visiting Jordan for culture or for cultural activities, it is safe to speculate that cultural tourism is the main motivator for tourists in Jordan. As such, it is recommended that cultural tourism is inevitably selected for this project and any Jordanian tourism product development, given the size of the international market and Jordan's track record in this product.

Spiritual Tourism

While there are different terminologies and varying activities and debates on what constitutes spiritual, faith-based, or religious tourism, the broad definition is that it is a form of tourism driven by a faith or set of beliefs (Griffin and Raj, 2017). Motivations for spiritual tourism range from strict adherence to faith, to broader forms of spirituality, and even secular motivations; those motivations have changed considerably in recent times (Raj and Griffin, 2020). Accordingly, Raj and Griffin (2020) state that host countries and communities now witness great benefits in spiritual tourism as a means of regional development, sociocultural exchange, economic development, and environmental enhancements.

The exact number of spiritual tourists is debatable but Griffin and Raj (2017) conclude that it is estimated that the number is higher than 300 million tourists worldwide per year as of 2017. In terms of value, the spiritual tourism industry is estimated at $18 billion, $10 billion of which are from North America alone; where 25% of adults are interested in a spiritual vacation (Griffin and Raj, 2017).

The UNWTO dedicated an international conference for religious tourism for the first time in Fatima, Portugal, in 2017, stressing the importance of religious tourism as a vector of sustainable tourism and a contributor to the decentralisation of touristic economic benefits (UNWTO, 2017). However, COVID-19 shut down almost all pilgrimage sites and the majority of faith sites during most of 2020. It is expected that pilgrimage sites, attracting the highest number of visitors compared to other faith sites, will be closed for 2021 (Raj and Griffin, 2020). Despite the fact, Raj and Griffin (2020), maintain that faith-based tourism is very resilient and will meet the challenges of COVID-19. Griffin and Raj (2017) argues that between the loyal faith-motivated tourists and secular cultural-experience-motivated tourists, the spiritual tourist destinations will always recover, even from COVID-19’s tremendous effects (Raj and Griffin, 2020).

According to Global Data (2018) consumer survey, 11% of millennials, 8% of generation X, and 4% of baby boomers expressed that they are likely to book a religious holiday in

The spiritual tourism industry is estimated at $18 billion. In terms of the preferred destinations, the Middle East and Africa have the highest potential for booking a religious trip.

the upcoming year. In terms of the preferred destinations, the Middle East and Africa have the highest potential for booking a religious trip, according to the survey, with 26% of respondents, followed by the Asian Pacific at 13%, specifically for Indian nationals, who form 32% of overall respondents (Global Data, 2018).

A very intriguing case for spiritual tourism is that of the U.S. On the demographics of the American spiritual tourist, Griffin and Raj (2017) mentions that more than 60% of the American spiritual tourists possess a degree or postgraduate qualification; more than 50% have a household income higher than $75,000; over 70% are married; and all age groups are almost identical in representation, with one third in each for the 18–34, 35–54, and 55+ age groups. The same study argues that this demographic rarely has price as its top priority; spends more on a trip compared to the average tourist demographic; is the most resilient and loyal (faith-based not brand loyal) of all tourists, specifically when analysing data of travel during financial recessions; and that this demographic normally travels in groups (not solo), which is found to have a positive economic impact on destination economies. The World Tourism Organization has also confirmed, via its research, the resilience of spiritual tourism in the face of trends and crises. (UNWTO, 2017)

On a more specific and regional front, the Netherlands Ministry of Foreign Affairs Centre for the Promotion of Imports from developing countries (CBI) published a study with the title “the European market potential for religious tourism”, concluding that European spiritual tourists present an opportunity for spiritual inbound tourism to the developing world, namely the Middle East. The study reiterates the significance of spiritual tourism; its generally higher resilience; the characteristics of spiritual tourists as a more loyal touristic segment and their higher spending ability on average. It additionally makes the distinction between believers and non-believers, highlighting that the former are primarily

motivated in reinforcing their beliefs, while the latter are drawn to the heritage values of the spiritual sites and practices (sociocultural, aesthetic, and historical values). Although Christianity is the most prevalent religion in Europe, CBI argues that the market of spiritual tourism within the non-believer segment is equally an opportunity and that the most important source markets for spiritual tourism are Germany, the United Kingdom, France, Italy, Spain, and the Netherlands. (CBI, 2020)

The research supporting spiritual and religious tourism, coupled with the abundance of religious sites in Jordan, makes the subsector a highly attractive one that could easily be turned into touristic products for Christian and Muslim tourists. For Christian tourism in specific, the "Baptism Site[8]" is on the Jordan River; 14 prophets and saints of the Abrahamic religions are buried in Jordan with shrines commemorating them in good shape; two world heritage sites of Christian value are also found (Umm al Rasas and the Baptism Site); and two of the oldest churches ever discovered are in Mafraq and Aqaba. On the Islamic front, thousands of the Sahabah[9] are buried in Jordan with mosques built commemorating them, and two of the three most important battles of Islam were located in Jordan.

The Ministry of Tourism and Antiquities shows that by number of visitors, Mount Nebo, a Chrsitian religious site, is second to Petra with 669 thousand visitors in 2019, while arguably more important world heritage sites, such as the Baptism Site, welcomed 183 thousand visitors only in that same year. The key

8 Christianity started after the baptism in the recognized "Baptism Site" on the river Jordan, St. John spent most of his adult life until its end in Jordan and is named the Saint of Jordan

9 Islamic equivalence of the Christian disciples

difference is attributed to the independent effort made by the Franciscan Church, which manages the site in providing religious services on-site as well as developing and sending out multilingual material to its followers worldwide. (MOTA, 2021)

The importance of religious tourism did not go unnoticed locally, where currently the Ministry of Tourism and Antiquities in Jordan is developing religious touristic products, and the national strategy for tourism names faith-based tourism as one of the key touristic product offerings (MoTA, 2018). MOTA and the Jordan Tourism Board (JTB) have taken steps in alleviating the most prominent barrier to this market, which is entry restrictions on the majority of African, Eastern European, Latin American, and Asian nationals. Recent trips for the first Nigerian Christian pilgrims subsidised by JTB are thought to be a prominent example of Jordan showing willingness to tap into this market and alleviate age-old restrictions on certain nationals, eliminating their potential as tourists[10].

[10] Official news article of the first Nigerian pilgrims trip https://petra.gov.jo/Include/InnerPage.jsp?ID=184278&lang=ar&name=news

> **It is estimated that the ANZAC day visitors spend $46 million annually with a $90 million contribution to the Turkish economy factoring in an estimated 1.96 multiplier effect.**

Battle Reenactment Tourism

There are certain events that define a nation, coined in Nora and Kritzman (1996) as golden events, most prevalent of which are battles. The narratives of those golden events constitute an important part of national narrative building (Nora and Kritzman, 1996), which later developed into a lucrative tourism product. The events titled “Battle Reenactments” entail groups of people that dress up in costume and adopt role playing, literally reenacting a certain battle, usually at the site of the particular battlefield (Howard, 2003). The shift from symbolic heritage conservation; in this case the battle, towards battlefield reenactment, allowed for the interpretation of heritage, as well as the contribution to it, by the very act of individualized role adoption (Howard, 2003). The granted battlefield reenactment supporters usually come from the cultural organizations (naturally state funded and non-profit organizations) interested in spreading awareness to the battle in deeper, more individualized, and more dynamic forms of heritage conservation, as well as the tourism stakeholders interested in the footfall that battlefield reenactment brings about to remote areas (Howard, 2003).

On a global front, World War I tours are now a normal product offering attracting millions worldwide to museums, commemoration sites, and battlefields. Ten thousand Australians and New Zealanders visit the battlefield of Gallipoli in Turkey every year on ANZAC day. It is estimated that the ANZAC day visitors spend $46 million annually with a $90 million contribution to the Turkish economy, factoring in an estimated 1.96 multiplier effect. (Basarin and Hall, 2008)

The US economy, on the other hand, has witnessed economic benefits from battlefield tourism, with the twenty popular battlefield tourism sites attracting, by 2017, on average 14.5 million visitors (almost 80% of whom are from outside the area of the site), spending $774 million in nearby communities; creating 9,370 direct jobs; and paying $23.5 million in sales tax to local authorities. From the 14.5 million visitors, one third expressed that they traveled with the primary motive of visiting the battlefield and 41% indicated that the battlefield was one of the reasons for their visit (THCG, 2017).

The Battlefield Reenactment as an event is normally conducted over a couple of days. According to research conducted in the US, reenactment events attract 50–200% more visitors than what heritage sites had drawn before the creation of reenactment events. This highlights the importance of shifting heritage tourism from visiting heritage sites to engaging entertainment-based sites based on actual heritage representation (THCG, 2012). As for the battlefield tourists, research shows they are amongst the most loyal, emotionally invested, and least price sensitive compared to the average tourist. (Sharma and Nayak 2019)

In the case of Jordan, it is home to two of the three most important battles in Islam: Mu'tah and Yarmouk; the popular Salahedine siege of Karak; the famous Sixth legion of the Roman army in Jerash; and four prominent World War I battlefield sites (Aqaba, Tafileh, Salt, and Azraq, with British, French, and Anzac roles in Salt and Azraq). Those battles are of significance to a wide spectrum of nations. Jordan Heritage Revival Company, JHRC, part of the King Abdullah II Fund for Development embarked on reenacting battlefield tourism with debatable success. Currently, there are small-scale shows in Jerash, Petra, and Shobak, reenacting the soldier formations and training scenarios. Battlefield reenactment as an add-on product to a cultural tourism itinerary is seen to be beneficial, especially with the unique battlefield sites in Jordan.

Jordan is home to two of the three most important battles in Islam, Mu'tah and Yarmouk, to the popular Salahedine siege of Karak, to the famous Sixth legion of the Roman army in Jerash, and to four prominent World War I battlefield sites. Therefore, battlefield reenactment as an add-on product to a cultural tourism itinerary is seen to be beneficial.

Gastronomy Tourism

Gastronomy tourism is generally defined as "touristic visits to food production areas, festivals, or local restaurants in order to observe the taste or production of certain types of food belonging to a region" Pamukcu et al. (2021, P3). Statistics on the percentage of international tourists with the motive of gastronomy tourism could not be found, but literature indicates that the local cuisine is a significant part of the attractiveness of a certain destination for tourists. If an authority certifies the geographic locality of food, it gives it a high value both in terms of quality and price, and thus continuously highlights it in its destination marketing (Pamucku et al., 2021).

Gastronomy tourism is not just related to the food culture, but more likely to it being positioned as part of a larger attractive cultural touristic product. Within gastronomy tourism, wine trails are gaining popularity, especially in southern Mediterranean destination countries, where millions of wine tourists visit France (10 million), Italy (14 million) and Spain (3 million), with contributions of \$5.2, \$2.5, and \$0.256 billion respectively as of 2008 (Correia et al., 2008). Gastronomy tourism is expected to continue to grow and form an even more significant part of the motive behind choosing a destination. (Pamukcu, 2021)

Jordanian cuisine is in its infancy stage with four restaurants describing themselves as serving local cuisine, all located in the capital Amman. Wine tourism, on the other hand, is a farfetched touristic product, whether due to the cultural imperative, or the number of wineries available. As such, it is recommended that development of localised menus in existing restaurants would be the most rewarding endeavour to establish an add-on cultural product for Jordan at this point in time.

Film Tourism

Popular films and series attract fans to the filming location. Film tourists have doubled between the years 2013 and 2018, reaching 80 million tourists, the top destinations being Los Angeles, Scotland, London, Florence, New York, Hong Kong, Iceland, Ireland, New Zealand, Paris, Colombia, Berlin, and Dubai. Film tourists are largely millennials; are mostly Chinese and GCC tourists; are higher spenders; and are 27% more likely to share their experience on social media compared to the average tourist (TCI, 2018). In 2017, 39% of UK tourists visited a location set while on holiday, and 7% of respondents made the trip for the sole purpose of visiting a film location (Statista, 2020). It is expected that the wide reach of films and series will keep growing, and with it more destinations will market themselves through attributes of the films and series filmed there. Domínguez-Azcue et al. (2021)

Jordan was home to blockbuster films starting with Lawrence of Arabia, Indiana Jones and the Last Crusade, in addition to X Men: Apocalypse, The Martian, Star Wars (Rogue One: A Star Wars Story), and Aladdin (RFC, 2021). As of today, no trails, experiences or merchandise related to the above or other films are provided in Jordan. Tapping into the niche 7% who would make a trip for the sole purpose of visiting a movie or series set (assuming UK sample of Statista (2020) applies worldwide) with full-fledged itineraries, may be a cost-effective targeted promotion. On a larger scale, add-on experiences in Petra and Wadi Rum, where the majority of those blockbuster films were shot, is definitely recommended and seen to be an addition to the overall touristic products of Jordan.

03 FUTURE TOURISM OUTLOOK

International Tourism Outlook

Between the new COVID-19 variants and the economic aftermath of the pandemic, the forecasts for the industry hit the hardest, tourism, is fluctuating. Main factors affecting the rebound of the industry are vaccination rollout, travel restrictions, policies pertaining to them, and new virus variants. Experts expect a rebound to 2019 tourism levels by 2024 and further. The same experts, deemed as experts by the leading international organization on tourism, UNWTO, are divided on when a rebound in the industry would occur, and when it does, whether it will rebound to 2019 levels in a U-Shaped curve or a V-Shaped curve (UNWTO, 2021).

It is widely accepted that the COVID-19 pandemic is still not over, and until it is, open-air domestic travel will be the most logical touristic choice. At the same time, remote work, solo travel, female travel, and virtual tours will remian, at least for the foreseeable future. Lifting travel restrictions and vaccination bubbles will create short-term hikes, albeit short-lived, until travel goes back to normal and the competitive advantage of vaccination bubbles is no longer valid.

Research shows that leisure tourism is the most resilient, with promising growth rates for wellness, cultural, spiritual, and ecotourism. Thus, there is no concrete forecast for the future of tourism, as of 2021, but if Jordan is to rebound most effectively, it should navigate the unclear future from a starting point of its unique strengths. This shall be highlighted in the regional and SWOT analysis in the upcoming section.

Regional Tourism Outlook

It is very difficult to obtain reliable statistics on tourism in the Middle East and North Africa, but Bonifcae et al. (2020) concludes that the whole MENA region is underperforming in terms of tourism, taking into account its potential and proximity to one of

> **According to Bonifcae et al. (2020), the whole MENA region is underperforming in terms of tourism, taking into account its potential, as well as its proximity to Europe the largest tourism sources worldwide Europe, and two of the fastest growing sources; Asia and Africa.**

the largest tourism sources worldwide: Europe, and two of the fastest growing sources: Asia and Africa. The same study notes that the region only started seeing tourism as a strategic contributor to GDP in the 1980's, and that there are large differences in performance between countries in the MENA region, attributed mainly to geographic and internal politics (Bonifcae et al. 2020). According to World Data (2020c), in 2019, the UAE was ranked first in the region with 21.6 million tourists spending $38.4 billion, while Saudi Arabia was ranked second with 20.3 million tourists and $19.85 billion in spending. Egypt and Morocco were ranked third and fourth with 13.1 and 13 million visitors and $10 and $14 billion, respectively (World Data, 2020c). The recorded number of tourists to the MENA region is 114.9 million as of 2020. The UAE and KSA combined drew 41.9 million tourists, estimated at 36.4%, while the top four countries mentioned are responsible for 59% of all tourism to the region with a combined number of 68 million tourists (World Data, 2020c). There is a stark disparity between the countries of the MENA region and within it might be great opportunities for Jordan.

If one were to group MENA countries according to tourists and their spending, the first tier would be KSA and UAE with more than 20 million tourists and over $20 billion in spending. The second tier would be between 10–19.9 million tourists and over $10 billion in spending, this tier is composed of Egypt and Morocco. Finally, the third tier, with spending below $9.9 billion and number of tourists below 10 million, is comprised of the following MENA destinations, ranked according to number of visitors: Bahrain (11.1m), Tunisia (9.4m), Kuwait (8.6m), Jordan (5.4m), Oman (3.5m), Qatar (2.1m) and Lebanon (1.9m) (World Data, 2020c). It should be noted that visitors to Kuwait and Tunisia may be expatriates living abroad and visiting multiple times for no longer than 12 months, thus counted as tourists. This can be substantiated by the amount of spending being very low compared to the international average, as Kuwait's recorded tourist spending in 2019 was $1.18 billion, and Tunisia's was $2.69 billion (World Data, 2020c). Furthermore, visitors to Bahrain include the nearby weekend and day visitors from Eastern KSA, which are likely to conduct multiple visits a week but may not spend the night in Manama and hence only contribute $3.86 billion (World Data, 2020c).

The UAE leads the region in connection-flight tourism, shopping tourism, meetings, conventions, and exhibitions, MICE tourism, and most recently being the only country in the Middle East and all of Africa to offer digital nomad visas[11] as early as July 2020 (FK, 2021c). Although the UAE's weather makes its outdoors very harsh for many months of the year, its international grade entertainment, shopping centers, nightlife, and business ease and infrastructure, along with two of the top ten airlines internationally (Emirates and Etihad) and very open entry procedures make the UAE an international tourism player. KSA, on the other hand, is the largest religious tourism destination in the world. The country is keen on growing its tourism sector and has announced its Vision 2030 with much emphasis on tourism. Hence, targeting tourists who are already in the region in the UAE and KSA is likely to bring good results to Jordan. Attracting tourists in close geographic proximity can be in the form of subsidising affordable two-way flights with short itineraries (just as the low-cost airlines to Europe were subsidised); complementary products for MICE and religious tourists; and a strategic package to turn Amman into a connection-flight destination on the way to and from Dubai and Jeddah airports.

[11] Visas for those that work remotely but are not employed within the country they reside in and normally spend their time after work as tourists.

In the second tier, there is much to learn from Egypt and Morocco's "leisure meets culture" product offerings. In Morocco, for instance, the main attraction is the beach in Marrakech, but the cities just beside it are rich with culture. The case of Egypt is similar with Hurghuda and Sharm El Sheikh being sea-side attractions that can be reached by passing through the pyramids, souks, and museums of Giza. The culture meets sea geography and history, coupled with lenient laws and higher cultural acceptance of the tourism nightlife has led to a relatively successful tourism model, contributing 8.9% and 3.9% to the GDPs of Morocco and Egypt, respectively (World Data, 2020c). In the case of Jordan, while its cultural product is unique and strong, its leisure offerings are still very weak, and there are no signs that this would change in the foreseeable future.

In the third tier, Tunisia has great potential, but the current political developments will likely have a negative impact on tourism, at least for the short term. Lebanon is rendered out of the picture with the current political turmoil and lack of commodities. Bahrain will continue to be a repeat visit destination for young Saudis and expatriates in East KSA. Oman has been taking strategic steps in cultural and ecotourism, but Jordan remains amongst the top destinations in the region with a substantial ecotourism product offering. (Bonifcae et al., 2020)

Two highlights should be noted in the Middle East today: the Saudi Vision 2030, which stresses the importance of tourism contribution to KSA's GDP in the next decade and promises huge projects along the northwest region of its Red Sea shores; in addition to Qatar 2022 World Cup, which should attract millions of fans to the region. In the case of Saudi Arabia, a collaboration with Jordan and common itineraries could be beneficial, as is the case with Egypt, especially with Petra being the Nabatean capital of the North West region connecting the two countries and the continuum of Islamic tourism historically to the ancient shrines in Jordan. The same is recommended in Qatar, as it is foreseen that World Cup visitors may want a broader itinerary to the Middle East, as opposed to just visiting Qatar.

In retrospect, when viewing the tourism market of the MENA region, Jordan has much to learn to be able to compete with the leisure–culture product offering of Egypt and Morocco. It also has much to gain from targeting the 40+ million tourists that flocked to the UAE and KSA in 2019, and it should view the Qatar World Cup as a tourism opportunity for connection flight tourism if it aligns its entry requirements accordingly, especially since it is only top ranked in the region in its ecotourism product offering. As such, given the current ranking of Jordan in ecotourism and cultural sites, coupled with the barrier to leisure tourism, it is recommended that Jordan offers a cultural complimentary itinerary to regional tourists (MICE in Dubai, leisure in Egypt, and spiritual in KSA) while it maintains its ecotourism lead and increases its capacity, branding, and conservation efforts.

04 OPPORTUNITIES AND THREATS FOR JORDAN’S TOURISM INDUSTRY

The final aim of this report is to grab a well-rounded sense of the global tourism tides and trends and use this sense to act nationally, providing the best possible positioning for Jordan to enable the country to benefit the most from these trends and for the project to select the curated experiences that are more probable in order to seize the internationally highlighted opportunities.

Four main touristic products: wellness, leisure, ecological, and cultural tourism, and several subsets including spa, yoga and meditation, birdwatching, dark sky, spiritual, battlefield, gastronomic, and film tourism were analysed and reviewed to assess which of them is the most suitable for the Jordanian market to pursue.

A SWOT analysis would pave the way for a leaner planning phase for the project to select the curated touristic experiences or products. Accordingly, the upcoming section presents the main strengths, weaknesses, opportunities, and threats pertaining to each touristic product. Wellness tourism was seen as too broad to be considered as a touristic product on its own, and its subsets spa and yoga & meditation were analysed instead.

Spa Tourism

Strengths

- Spas are a requirement in 5-star hotels in Jordan, and there are tens of them offering international-level spa experiences
- Hot springs in the south, mid, and north of Jordan that can be utilised

Weaknesses

- Middle-range spa experiences are a minority; majority are either luxury or substandard. This gap limits the target audiences that can be attracted and narrows them down to the affluent few who can pay the hefty price tag
- The scarcity of packaged wellness and/or spa retreat packages on their own
- No local training or educational institutes for spa experiences, resulting in hiring international staff, which automatically translates into higher prices
- No localised or authentic spa experiences

Opportunities

- Tapping into the solo female traveller and the nearby hubs of expat women in the GCC could prove a beneficial step
- Capacity building for existing spas to make them more localised by using local products and hiring local staff would increase the attractiveness of the product and reduce its prices
- Europe and North America lead the way with more than half of wellness trips and expenditure, and they are already established markets for tourism to Jordan
- Increasing female employment participation in the tourism workforce

Threats

Yoga and Meditation Tourism

Strengths

- Jordan has one of the first meditation communities historically in Umm Al Rasas, the Stylistic sect
- Abundance of quiet and isolated destinations from nature reserves to touristic farms across the mountains, deserts, and plains of Jordan

Weaknesses

- Weak presence on digital yoga and meditation retreat websites

Opportunities

- Reviving Umm Al Rasas as a meditation capital. The revival of the site with links to meditation is sure to gain great publicity and attract the yoga and meditation practitioners
- Linking tour operators with yoga and meditation studios/instructors in Jordan and packaging yoga and meditation retreats on digital platforms

Threats

- Contradiction and resistance of the local community for a new practice of spiritual origins, which can be alleviated when meditation is pitched as a practice that is not religious that attracts all believer and nonbeliever groups

Leisure Tourism

Strengths

- Target market presents a similar culture to that of GCC families

Weaknesses

- Very weak nightlife
- No retirement homes at beaches

Opportunities

- Develop a leisure product around conservative family activities

Threats

*Leisure is defined for the purpose of this project as beach holiday-themed tourism activities and excludes wellness, ecotourism and cultural tourism.

Ecotourism

Strengths

- Caters for both domestic and international tourists
- Linked sports (hiking) and health benefits that are already being conducted
- Independent of site closures for the most part
- 12 nature reserves already operational and protected[12]

Weaknesses

- Capacity of ecolodges and motels at nature protected areas is very low
- No licensing of adventure/eco tour guides up to this moment, which renders all eco tours illegal
- Requires extensive capacity building to cultivate linkages, especially with agricultural tourism

Opportunities

- Directly benefits the economies of rural areas
- Introduces hospitality services to areas where it is not available

Threats

- The ability to sustain services in rural areas
- May lead to pollution and loss of habitat
- Lack of acceptance from the local community

12 http://www.rscn.org.jo/protected-areas

Birdwatching Tourism

Strengths

- Jordan is a strategic and important flyway for global bird migration

Weaknesses

- Not enough infrastructure for birdwatching is available, which includes hide-outs, equipment rental, and knowledgeable guides. All of this can be ameliorated with cost-effective capacity building

Opportunities

- Birdwatching is expected to make the fastest recovery post COVID-19, and thus reaping the fastest results
- Requires low investment and capacity building, whether in tour guide training, building watch shacks, or having amateur photography equipment and specialized camouflage attire for rental on-site

Threats

- Pollution and habitat loss with the continuous loss of water from Tabaria, Azraq, Jordan River, and the Zarqa stream

Dark Sky Tourism, DST

Strengths

- Jordan’s clear skies for nearly 225 days per annum in addition to fair weather most of the year makes for a great DST atmosphere
- Light pollution is centered in Amman, Zarqa, and Irbid, leaving the rest of the geography relatively free of light pollution, thus creating an enabling environment for dark sky tourism
- The existence of nature reserves that can act as dark sky protected areas
- Nabatean astronomy heritage

Weaknesses

- Lack of experience in implementing touristic products relating to DST
- The current stargazing experiences are not linked to local contemporary or ancient Nabatean heritage, thus presenting a weaker product offering

Opportunities

- Backing of UNESCO and other astronomy organisations to DST creates awareness and possibility of sector growth
- Raising awareness concerning the negative effects of blue light on health and sleep quality adds to the possibility of DST becoming a bigger trend
- Low cost of providing subsidy to reduce light pollution in potential DST destinations in Jordan. This can be done through installing covers on light fixtures, preventing light from being emitted upwards into the sky, hence, turning existing destinations like Dana, Wadi Rum, Feynan, and Ajloun etc. into dark sky protected areas is highly possible
- Nature preservation and sustainability are inherent in the nature of DST as artificial light affects local fauna negatively. Hence, collaboration with RSCN to include dark sky protection areas in future product offerings, especially since the cost to apply for DS protected areas is negligible
- Providing a subsidy to eliminate blue light in tourist facilities in Jordan will create a more attractive atmosphere for all tourists. This can be done by replacing light fixtures at these facilities with warmer light fixtures
- Easy conformance with COVID-19 safety precautions, due to it being an outdoor activity

Threats

- Resistance of private sector tourism service providers to endorsing light pollution reduction measures

Agritourism

Strengths

- Agricultural regions are not too far from current tourist attractions, which gives it a strength as an add-on product to any Jordanian tourism itinerary
- MOTA just legalised touristic farms as wedding destinations. This legal framework, nonetheless, accommodates agritourism as well

Weaknesses

- Very limited experience and capacity and will need extensive investment for the product to return substantial benefits
- Roads leading to farming regions are in poor conditions and so is the infrastructure in general
- Majority of farmers are not bilingual

Opportunities

- Jordan's agriculture is year-round; thus on the supply side of agritourism, there will always be an agricultural product in season for tourists to visit

Threats

- Farmers avoiding the touristic farm license to avoid fees and taxes which renders the sector in the dark in terms of tourist exploitation, especially when it comes to safety concerns

Cultural Heritage Tourism

Strengths

- Jordan's diverse cultural scene, harbouring music, cuisine, and the arts
- Multiple elements of Jordanian cultural heritage have now been listed on the UNESCO world heritage list
- The presence of five UNESCO world heritage sites

Weaknesses

- No new digitisation efforts were found when surveying all Jordanian museums' websites

Opportunities

- Building on existing archeological heritage tourism and linking it with the wider culture of local communities with add-on music, arts, cuisine, and handicraft experiences
- Low investment to package and promote cultural heritage experiences

Threats

- Lack of funding for archeological sites and inefficient operational times in addition to poor conservation, no restoration, and poor services of these sites

Spiritual Tourism

Strengths

- Jordan is home to thousands of Sahaba shrines and Islamic & Christian holy sites
- Historically, Jordan has been a part of the Islamic and Christian pilgrimage routes
- The UNESCO and Vatican's recognition of the holy sites in Jordan
- The capital Amman's message advocating for cross-faith respect, harmony, and tolerance
- Current will of MOTA to target Christian pilgrims

Weaknesses

- Religious sites close at 3 pm and public holidays
- Supporting services for religious activities are missing (candle lighting, Muslim prayer carpet provision etc.)

Opportunities

- Hajj and Umrah Islamic pilgrimage in bordering KSA create an opportunity to link a dual country packaged trail
- Christian pilgrimage right at the border coupled with previous experience in co-packaging Christian pilgrimage trails

Threats

- Limited direct flights to Latin America, Africa, East Europe and most of Asia

Battle Reenactment Tourism

Strengths

- Mu'tah and Yarmouk are two of the three major Islamic battlefields and both happened in Jordan
- Crusader–Salaheddine battlefields in Shobak and Karak
- Roman and Greek battalions incubated in Jordan
- WWI battlefields in Tafileh, Salt, Aqaba, and Azraq
- Abundance of war-related sites from castles to trenches and everything in between

Weaknesses

- Current reenactment services are weak and rare

Opportunities

- Creating battle reenactment experiences across Jordan needs moderate investment
- Tens of castles and military sites that can be utilised

Threats

Gastronomic Tourism

Strengths

- Independent of seasonality
- Jordan is multicultural and thus possesses a unique mixture of flavours and food traditions

Weaknesses

- Weak local cuisine product offering with few restaurants claiming to offer it

Opportunities

- Create local cuisine trails
- Create street food itineraries

Threats

- Home-cooking not following any health regulation; possible PR threat in case of poisoning thus the need for licensed restaurants or licensed home-cooking providers

Film Tourism

Strengths

- Jordan was home to blockbuster films starting with Lawrence of Arabia, Indiana Jones and the Last Crusade, in addition, to X Men: Apocalypse, The Martian, Star Wars (Rogue One: A Star Wars Story), and Aladdin (RFC, 2021)
- The majority of film locations are in Wadi Rum and Petra, and both are in the same conditions they had been in when the movies were filmed

Weaknesses

- No trails, experiences or merchandise related to the blockbuster films provided in Jordan.
- Lack of experience, equipment, and marketing material will be hurdles to overcome for this product to be successful

Opportunities

- Create a movie trail across the filming locations with add-on experiences that include wearing hero costumes, filming short clips of the tourist for social media, and guided movie trivia tours
- Market those film-related experiences to existing tourists in Petra and Wadi Rum

Threats

- Proper copyrights and licensing from film producers need to be in place to avoid lawsuits

05 RECOMMENDED PROJECT EXPERIENCES

The key findings and recommendations of this report aim to provide a general guide for a better placement of Jordan's tourism sector, where it can benefit from the current trends that are emerging. On a more direct front, it will assist the Shiraka project, funded by the Embassy of Netherlands and implemented by Leaders International, in selecting touristic experiences that maximise the trends and opportunities discussed throughout this report. Accordingly, based on thorough research and analysis of the international and regional tourism trends, along with a specific SWOT analysis pertaining to each analysed product in Jordan, the final recommendations for the curated touristic experiences are presented below:

- Packaging a localised wellness touristic product with both spa and yoga & meditation add-on products, and target solo female travellers, American and European tourists, and yoga & meditation practitioners as target audience for inbound tourism, whilst utilising existing spa, and yoga & meditation digital tourism platforms
- Packaging an ecotourism product along with a major emphasis on birdwatching and minor attraction of dark sky tourism, targeting the American and European markets with the proven potential elaborated on.
- Developing a focused Christian heritage trail targeting existing markets in Europe and North America as well as potential markets in Latin America, Africa, Eastern Europe, and India.
- Developing an add-on Islamic trail and targeting the 20+ million spiritual tourists that visit KSA and the potential European Muslim communities.
- Developing a cultural trail that encompasses archeological, intangible, and gastronomic heritage with a possible add-on film experience, if found feasible, and targeting cultural tourists, as well as regional leisure tourists, especially if entry restrictions are eased, turning Amman into a connection-flight tourism hub for UAE MICE tourism and KSA spiritual tourism industries.

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