JORDAN TOURISM DEVELOPMENT PROJECT II (JTD II)

JORDAN NATIONAL TOURISM INDICATORS
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ACRONYMS

DOS	Department of Statistics
DTVS	Domestic Tourism Visitor Survey
GDP	gross domestic product
GID	General Intelligence Department
HEIS	household expenditure and income survey
JHA	Jordan Hotel Association
JIB	Jordan Investment Board
JTB	Jordan Tourism Board
JTD II	Jordan Tourism Development Project, phase II
MOTA	Ministry of Tourism and Antiquities
NTS	National Tourism Strategy
NTVS	National Tourism Visitor Survey
SNA	system of national accounts
TVA	tourism value added
VA	value added
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council

INTRODUCTION

Jordan is interested in developing a set of indicators in the context of the elaboration of its upcoming National Tourism Strategy (NTS).This has led to a number of questions about the development of both indicators and statistics:

What are the accepted international standards for tourism indicators?

In light of those international standards and best practices, what is recommended for Jordan, and how can the recommended indicators be calculated, if at all?

In several key areas, there are estimates of key indicators about Jordanian tourism that differ from each other. Why is this occurring? Is one variant correct and the others wrong, or do they simply measure different things?

The development of the NTS is in part organized around a desire to grow specific segments of the tourism market, and to attract tourists interested in certain specific vacation experiences. Can Jordan develop indicators that will show how the country is performing with respect to those market segments?

Jordan would like to position itself as a "boutique destination," one that attracts a relatively small number of tourists who spend large amounts, rather than being a mass market, less expensive destination. How can data or indicators help identify target markets suited to this niche or progress in accomplishing that goal?

Jordanians have reviewed a number of outside indicators, including those of the World Economic Forum and the World Travel and Tourism Council, and are interested in whether they offer useful measures for the country to track or to evaluate its own performance.

Interest has been expressed in consolidating all existing data sources on tourism in a central tourism information center, which would provide indicators, statistical reports, and data analysis to the tourism community. Is this a useful strategy, and if so where should the center be based?

Bearing in mind this mix of questions, this report begins with a discussion of the international best practice standard for tourism statistics. It then recommends a set of indicators for Jordanian tourism. They are based on several sources; the international standards developed by WTO, a list of core indicators developed by tourism stakeholders in Amman, and issues raised in discussions with those stakeholders during the consultant mission. In light of the emphasis placed on international best practices rather than issues particularly to Jordan's tourism development, this list does not reflect an assessment of policy decisions being made in Jordan and how they can best be informed by better information. The report then goes on to make specific recommendations as to the steps required to begin calculating those indicators; where data that are not available it considers options for new

primary data collection. It then addresses the need for stronger collaboration among data users and producers in Jordan, including the possibility of creating a data center.

A number of annexes complement this report. The first six provide extensive technical detail about available data sources and the steps required to calculate the recommended indicators or resolve data discrepancies. This is not, unfortunately, completely comprehensive; time did not permit complete identification of all primary data collection and data flows within the country, particularly with respect to the full details of information submitted to MOTA by tourism businesses. However it does include most of the basic information in this area. The next four annexes includes the questionnaires used in four tourism surveys used in Jordan. The last is a list of individuals interviewed in the course of this consultancy.

INTERNATIONAL BEST PRACTICE: THE TOURISM SATELLITE ACCOUNTS

The international standard of best practice for tourism statistics has been set by the United Nations World Tourism Organization (WTO). They have recommended a set of indicators, measurement practices, and accounts that comprise the Tourism Satellite Accounts (TSA). The TSA is a "satellite" to the national income accounts, the data systems that all countries use to track the activity of their economies and to calculate indicators such as gross domestic product and growth rates. The methodology for the System of National Accounts (SNA) has been developed over the past half-century through collaboration among statistical offices worldwide, the World Bank, the OECD, the European Community, and the United Nations Statistics Division.

Satellite accounts are used to organize statistics about themes that do not fit into the structure of the main body of the national accounts. The SNA is organized by industry sectors (using International Standard Industrial, or ISIC Codes) and by products (using the Central Product Classification, or CPC). The data in the SNA are all economic; that is, they are monetary values rather than volumes, physical quantities, or other measures. Many topics of importance to the economy do not fit into this system, and thus cannot be measured within the SNA. Nevertheless it is important to study them in relation to the economy, in a statistical framework that can be linked to the national accounts so that links between them can be identified and analyzed. The concept of satellite accounting is a response to this need. The TSA is one type of satellite accounts; others organize data on the environment, household activities, and other topics.

Tourism does not fit into the SNA in several ways. As a type of production and consumption, tourism is defined by the purpose of the transactions, rather than the industry sector doing the producing or the products being bought and sold. Tourism is, to paraphrase the definition, the economic activity of people who are away from their usual environment for purposes other than employment. Some products and industries are typical of such activity – hotels, restaurants, transportation – but tourists may purchase a wide range of items produced by enterprises across the ISIC classification system. For this reason economic data about tourism must be organized in satellite accounts rather than within the core of the national accounts.

Like the SNA, the structure of the TSA has been developed through collaboration among national statisticians and international organizations, with coordination of the World Tourism Organization (WTO). The TSA consists of a set of ten tables compiled using data from a number of different sources. While special-purpose surveys are needed to estimate how much tourists spend, the tables depend just as much on economic data that do not have a direct link to tourism; economic surveys of enterprises, household expenditure surveys, and employment surveys.

The TSA uses the WTO definition of tourism as the actions of those who are "traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited." This rather technical definition is constructed so as to be consistent with the SNA, and is not always consistent with the everyday idea of what a tourist is. In everyday speech, we think of a tourist as someone who is traveling for fun – those on vacation and those visiting friends and family. The WTO definition includes anyone who travels away from home except for those who own businesses in the place they go to, those who are employed there, and those who are transiting to another country. Thus people traveling on business trips, students, those attending conferences, those on pilgrimage, those traveling for medical care, and many other travelers are all considered to be tourists in WTO statistics.

Applying the WTO definition is essential in order to compile economically valid measures of the role of tourism in the economy. However that definition may not be useful for tourism marketing and strategy development. To address that problem, the recommended indicators go beyond the WTO measures to include and measurements must consider both how to track the WTO measures and how to disaggregate those data by purpose of travel or origin of visitors, so as to produce information

about discretionary travel that can be influenced by a well-designed marketing strategy. The discussion of indicators below touches on how they can be disaggregated when that would be appropriate.

RECOMMENDED INDICATORS

The following indicators (or indicator groups) are recommended to provide a broad picture of Jordanian tourism. Most of these can be calculated now using available data, or require only modest additional work with existing data collection systems in order to calculate them. This section provides an overview of the recommended indicators and their use. The technical annexes to this report provide additional details on data sources and indicator calculation.

1.   Number of visitors

This is the basic point of departure in tracking tourism; how many tourists are there? Three measures must be monitored:

- Arrivals of day and overnight travelers;
- Number of overnights;
- Length of stay.

Ideally, these figures could be tracked by month, by region of nationality, by country of nationality, by country of residence, by package tour vs. independent, and by purpose of travel. Most of these figures are easily available in Jordan from border crossing data (provided by the General Intelligence Department, or GID), the National Tourism Visitor Survey (NTVS), and the Ministry of Tourism (MOTA). There are some discrepancies between the MOTA and NTVS data concerning overnights in hotels, which should be resolved in order to verify all of the overnight data and thus length of stay; this should be done before the overnight and length of stay data are incorporated into a routine tourism indicators report if one is produced.

2.   Share of tourism in GDP

The share of tourism in GDP is the core measure of the role of tourism in the economy. Calculating this measure is one of the key purposes of the TSA. This has not yet been done for Jordan, but it can be done from the NTVS data and other survey data collected by the Department of Statistics (DOS). Discussions are underway concerning completion of Jordan's first TSA during the winter of 2010.

A related measure has been calculated for Jordan and published in a number of sources; this is the ratio of total tourism revenue to GDP, currently about 14%. This is useful for observing trends over time in the role of tourism, but does not measure its contribution to GDP.

3.   Total tourism receipts

This indicator measures the expenditures in Jordan by visitors from other countries and by residents traveling within their own country. The data are collected separately for visitors to Jordan from abroad and domestic tourism, through the NTVS and a similar Domestic Tourism Visitor Survey (DTVS), first conducted by DOS in 2008.

Total inbound expenditures (those by visitors from other countries) measures the same thing as the foreign exchange contribution of tourism, or the travel receipts item in the Balance of Payments accounts. This figure is updated each year by the Central Bank based on the 2006-7 NTVS data, in the course of their construction of the Balance of Payments accounts.

Two related measures are important in tracking tourism receipts; average expenditures per visitor and average expenditure per visitor-day. If Jordan's tourism development strategy aims to increase revenue by bringing in more high-spending visitors, rather than through mass-market low-cost tours, it will be possible to track success by looking at all three of these expenditure measures.

In addition to these highly aggregate expenditure indicators, more detailed information is valuable for planning and strategy development. For these purposes it is important to look at

- Allocation of expenditures among key items (lodging, food and beverages, transport, entertainment, etc.);
- Expenditure by nationality;
- Expenditure by country of residence; since marketing strategies reach everyone living in a country rather than everyone of a given nationality, country of residence is often more important than nationality;
- Expenditures by package tourists vs. independent travelers;
- Expenditures according to type of lodging chosen; this is particularly important when considering Jordanians who often do not stay in hotels;
- Seasonal variation in expenditures;
- Variation in spending rates according to purpose of travel;
- Variation in spending according to where people go within Jordan.

Most of this detail is available from the NTVS and DTVS. The only significant element missing is detail about where inbound tourists travel within Jordan; the NTVS survey did not obtain this information. It will be important to include this the next time the NTVS is carried out.

4. Tourist arrivals and expenditure by market segments

The new National Tourism Strategy (NTS) aims to target specific tourism market segments, defined by the activities of interest to the visitors. At present data are not available to do this. The visitor surveys ask about purpose of travel, but the categories included in the surveys are not detailed enough to identify the narrower market segments or to track tourism patterns by segment. To develop such data, it will be necessary to introduce more narrowly defined purposes in the next NTVS. This and other future data collection efforts are discussed later in this report.

5. Consumption by residents of Jordan traveling abroad

The NTVS includes two surveys, one of visitors to Jordan from other countries and the other of Jordanians going abroad. The outbound survey provides total expenditures abroad, as well as an array of other data about outbound tourism. Like the inbound survey, the total expenditure figures are updated each year by the Central Bank. This total is the same as travel payments in the Balance of Payments Accounts.

6. Total revenue in the tourism industries

The tourism industries – or "tourism characteristic" and "tourism connected" industries in the terminology of the TSA – are the industries which provide products that are particularly important for tourism; hotels, restaurants, transportation, entertainment, etc. The total revenue of these sectors in Jordan is available from annual DOS surveys of commercial enterprises. These data will be compiled and summed when the TSA tables are completed.

7. Total employment and compensation of tourism workers

Employment in tourism industries is a key measure of its contribution to the Jordanian economy; this has been flagged by a group of industry stakeholders and public officials as a high priority indicator. Data on tourism employment and earnings are available from both DOS and MOTA. The two data sources are somewhat different; DOS data are more comprehensive than MOTA data for hotels and restaurants, but MOTA data can be disaggregated by location and therefore offer regional as well as national information. Employment indicators should be tracked from both data sources.

Industry stakeholders also identified indirect and induced employment and employment multipliers as indicators of interest to them. These are measures of the employment and economic activity in the sectors that provide inputs to tourism (indirect) or the employment and economic activity stimulated by the personal spending of workers in tourism and in its supply chain (induced). The calculation of multipliers for estimating indirect and induced employment and economic activity is done through the construction of input/output accounts. This work is underway in DOS at present; once it is complete, it should be possible to track indirect and induced employment as well as direct employment.

8.   Investment in tourism

Investment in tourism is a basis for anticipating future growth in the industry. Annual data on both domestic and foreign investments in Jordan's tourism sector are available from DOS, working collaboratively with the Central Bank and the Jordan Investment Board (JIB).

9.   Hotel capacity and occupancy rates

Hotel occupancy rates shed light both on how much room there is for growth in tourism and how well the hotel sector is recouping the value of its investments in capacity. These figures are available in considerable data from MOTA, which publishes them by month, location, classification of the hotel, and region of nationality of the visitors.

The MOTA data on hotel bed-nights should be consistent with the NTVS figures on visitor overnights by tourists who stay in hotels. Unfortunately, they are not; the NTVS figures are almost double the MOTA ones. Several different factors might explain this significant discrepancy, among them errors in the survey samples and inaccuracy in hotel reporting. It is important to determine the actual causes, and determine whether it is possible to reconcile the two data sources. This is essential, both in order to link expenditure data to MOTA's information sources and, perhaps more importantly, to ensure that when the next NTVS is carried out such discrepancies do not reappear.

The data reported by hotels include the nationality of visitors but not their country of residence. In part the discrepancies between the hotel data and the surveys arise because the two data sets treat Jordanians differently. In the survey data, Jordanians who live abroad are part of inbound tourism, and key classifications are by country of residence rather than by country of nationality. The hotel data, on the other hand, classify all visitors by nationality, so Jordanians living live abroad (who account for 20% of inbound tourism) are grouped with Jordanians who live in their own country. If hotels could begin reporting both nationality and country of residence, this element in the difference between the two data sets would be resolved; then efforts could focus on explaining the remaining differences.

There are also some minor discrepancies among the MOTA statistics on hotel occupancy; totals that should be the same but differ from one table to another. These issues probably will not be difficult to resolve, but this must be done to ensure the consistency of the indicators.

10.   "Occupancy rates" for other tourism services

Tourists depend on a number of other services in addition to hotels. While there is now considerable room for growth in hotel use, it is important to anticipate other constraints that could arise if the number of visitors increases. It will be important to develop new indicators with which to track capacity use for such services as charter buses, tour guides, rental cars, dive facilities, etc. This will depend on some modification of MOTA's reporting requirements from businesses to which they issue operating permits; this need should be addressed in the next few months.

11.   Government revenues from and expenditures on tourism

Government revenue from tourism may offer a justification for increased public funding of MOTA, JTB, and other tourism-related agencies. These figures should be related to data on the fiscal revenues provided by tourists, through sales taxes, corporate income taxes, visa fees, and other charges. They should also be related to expenditures on tourism marketing, both to attract tourists (by JTB) and to attract tourism investments (by JIB, ASEZA, and perhaps other agencies). All of these data can be obtained from public sector financial records, although identifying this information may take some work.

12.   Visits to Jordan tourism websites

Trends in the number of hits and new users on the various websites offering information about Jordan tourism – those of MOTA, JTB, JIB, ASEZA, and the DOS tourism data – will be an indicator of whether interest in Jordan tourism is growing over time. If the sites do not already have counters associated with them, installing them is easy.

13.   Visitor Satisfaction

Do visitors to Jordan enjoy their stay? Are they likely to return, the next time they are planning a vacation? What can Jordan do better? How do visitors in different market segments enjoy their experiences? This is important information that would inform the improvement of the product that Jordan is offering its visitors. At present few data are available to answer these questions. JTB is currently carrying out a visitor survey designed to inform its marketing work, which will shed some light on these issues. In the design of the next NTVS, additional thought must go into identifying a few well-chosen visitor satisfaction questions that can provide across-the-board information on these issues. The results of the ongoing JTB survey may shed light on which questions give the most useful results.

14.   Jordan's Tourism Competitiveness: the WEF Travel and Tourism Competitiveness Index (TTCI)

The Jordan tourism sector should track the overall TTCI, as it gives a useful view of how investment is tourism is perceived by potential funders in other countries. In addition, some of the underlying indicators may be of interest:

> **1.07** Time required to start a business (hard data);
>
> **1.08** Cost to start a business (hard data);
>
> **3.01** Business costs of terrorism (executive opinion survey);
>
> **10.02** Purchasing power parity (hard data);
>
> **10.05** Hotel price index (hard data).

These measures may influence the effectiveness of Jordan's tourism marketing efforts. Although they are not within the control of the tourism sector, it is important to be aware of their impact.

15.   Number of visitors to key tourist destinations

MOTA tracks the number of visitors to the cultural sites under its authority, and publishes seasonal data on its website. This provides useful information about trends in cultural tourism and revenues from site visits. At present, there are no limits on the number of visitors who may enter these sites (in total or at one time), but this has been discussed for heavily visited places such as Petra and Wadi Rum. If limits are set, then ticket sales will become a tool for daily facility management as well as an way to measure seasonal and long-term visitation trends.

DATA GAPS AND NEW PRIMARY DATA COLLECTION

Two significant new opportunities for primary data collection are under consideration in Jordan; carrying out the next NTVS, and introducing a departure card to be completed by everyone as they leave the country. These are not competing choices. To continue tracking tourism expenditures, the NTVS must be updated; the questions pertain to when that will happen, not whether, and to how the questionnaire will be designed. The level of expenditure detail needed for the TSA cannot be captured on a departure card, so it is not an alternative to updating the NTVS. A departure card can quickly collect responses to a few key questions, though, so it is interesting to consider whether one should be introduced.

The introduction of an arrival or departure card has advantages and disadvantages. On the plus side, it would make it possible to pose a few quick questions to everyone who comes to Jordan. When deciding which questions to include on the card, the relevant issue is what information is needed from all visitors rather than only from a sample. Country of residence would be useful, because it would make it possible to relate visitor survey data to border and hotel data, eliminating some of the confusion about the treatment of overseas Jordanians and perhaps resolving the data discrepancies between the two sources of information. Purpose of travel and place of lodging are asked on the arrival cards in many countries, and may be useful in Jordan as well. If the card is completed at departure rather than arrival, a few carefully chosen questions about visitor satisfaction could be of interest, although it is not clear that a full census is needed on this issue.

The introduction of the card would pose two significant challenges; ensuring that they are filled out completely and universally, and data entry and processing. At the border, the police must be willing to require submission of the card in order to stamp the passport for arrival or departure; otherwise it will not be completed uniformly. It would not suffice for the police to require the card only of those with foreign passports, since a key objective would be to obtain information about country of residence when it differs from nationality. If the police at all border points are not willing to handle the mechanisms of distributing the cards, requiring that everyone complete them, collecting them, and turning them over to MOTA or another tourism agency, the results will not be reliable. This may simply be a nuisance for GID, and they may not be willing to do it.

About nine million people cross Jordan's borders every year. This means nine million cards for which someone has to do rapid, accurate data entry. This is a big job. Since it will be an ongoing activity, not a one-time survey, a permanent data entry unit would have to be created in some tourism agency to do this work. One suggestion was that the data entry might be done directly at the border as people go through immigration; however even if the data entry only took two or three minutes per person, it would create massive backups at the border which would be unacceptable to the police, the travelers, the airlines, and probably everyone working at the airport. If there are nine million cards per year, even if a typist could enter the data from 50 cards per hour (which is unlikely), it would take a staff of at least one hundred full-time data entry clerks simply to enter all this data at the rate that the cards would be collected at the borders. Once the data have been entered, the tourism community would have to build the capacity to work with the resulting database. Thus a departure card may seem

simple, but the amount of work (and financial costs) involved in actually implementing its use may militate against introducing one.

If additional data are to come from the next NTVS, the question is how the survey should be designed so as to obtain additional information without making it more difficult to implement. The Jordan Tourism Development Project has commissioned two studies, one in 2007 and one in 2009, that touch on the design of a future NTVS inbound questionnaire, which cover some of the points raised here; for that work, please contact the project.[1]

Several issues should be addressed by the new survey:

- The purposes of travel identified in the survey should include enough detail to be able to identify visitors who are part of the different market segments targeted by the tourism strategy.

- The survey must identify an itinerary for each visitor, so that the results can be disaggregated according to where people go in the country, and expenditures can be linked to places. This issue is considered in some detail in the studies already completed for the JTD project.

- The survey must gather more and more reliable information about visitor satisfaction in Jordan. WTO has designed sample visitor surveys with a wide range of satisfaction questions; these are discussed in the technical annexes to this report, as are the satisfaction questions in the JTB marketing survey now being carried out.

Once planning begins on the next NTVS, it is strongly recommended that all of the tourism stakeholders work together to design the questionnaire, to ensure that it will meet as many different information needs as possible. This is a balancing act. The survey is expensive, and will only be carried out once every few years. It is essential to make the most of the opportunity to gather data; adding an additional question to the survey costs very little, whereas doing an additional survey to collect missing information would be prohibitively expensive. However the survey cannot be too long or too complex, or respondents will not be willing to provide the requested information. These two concerns must be traded off against each other in designing the questionnaire. Everyone with an interest in using the data should have an opportunity to provide input into its design, so they can decide together how to make best use of the limited survey space.

NEXT STEPS ON INDICATOR DEVELOPMENT

The indicators listed here can be calculated either from data that are already available or with relatively minor modifications of ongoing data collection work. The next steps towards regular reporting on tourism indicators are the following.

1. For some indicators, reporting can begin now, using data that are publicly available or that can be obtained from MOTA, DOS, or the Central Bank:

- Total monthly and annual arrivals by region of nationality;
- Total inbound and domestic tourism receipts;
- Inbound and domestic tourism expenditure (receipts) per visitor;
- Total expenditure by Jordanian residents abroad;
- Employment and compensation of employees in tourism enterprises registered with MOTA, by location;

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[1] Joy Hecht, August 2009, "Proposed modifications to the 2006-7 inbound tourism survey" and Joy Hecht, December 2007, "Planning and Implementation of a National Tourism Satellite Account" (section 4.5).

- Foreign direct investment in the tourism sector (requires obtaining tourism industry data from DOS for the FDI study);
- Hotel occupancy rates for classified hotels;
- Number of hits on Jordan tourism-related websites.

2. Resolve discrepancies within MOTA data and between MOTA and visitor survey data in order to begin reporting on other indicators:

- Number of nights in hotels by inbound and domestic tourists;
- Inbound and domestic overnights and length of stay;
- Inbound and domestic expenditure per visitor day;
- Number of visitors on package tours.

The discrepancies between the survey and MOTA data on hotel nights and numbers on package tours cast doubt on the validity of both sources of information. This uncertainty in turn casts doubt on the total data on inbound and domestic overnights and length of stay, which are calculated from the surveys. The discrepancies between survey and MOTA data concerning the number of people on package tours do not have as broad implications for other indicators, but they are nevertheless worrisome. All of these issues must be addressed as soon as possible through discussions among the key actors; DOS and MOTA at a minimum, probably supplemented by statisticians from JTB and ASEZA and perhaps representatives of the JTD II project, the Jordan Hotel Association (JHA), and the Jordan Tour Operators Association.

3. Calculate indicators using data already available from DOS:

- Total revenue and value added in tourism industries;
- Share of tourism in GDP;
- Total employment and compensation of employees in tourism industries;
- Domestic capital investment in tourism industries;
- Foreign direct investment in tourism, based on the 2004-5 investment survey.

The first four of these indicators are part of the TSA. Plans are under discussion to complete the TSA by spring 2010; it is strongly recommended that these move ahead efficiently.

4. Modify reporting to MOTA by tourism industries in order to develop additional indicators or clarify currently available data:

- Capacity and level of use for charter buses;
- Capacity and level of use for rental cars;
- Obtain country of residence as well as nationality from hotels; this may help clarify the discrepancies in hotel occupancy data.

5. Obtain Government of Jordan fiscal data in order to calculate indicators on public finance:

- Public expenditures on tourism;
- Tax and other public revenues attributable to tourism;
- Expenditure on tourism marketing.

6. Design the next NTVS to include issues not captured by the 2006-7 survey:

- Categories for purpose of visit that include the market segments targeted by the new tourism strategy;
- Data on destinations within Jordan for inbound tourists;
- Useful measures of tourism satisfaction.
-

COLLABORATION ON DATA PRODUCTION AND USE

The work on this consultancy has identified several concerns that might be resolved through better collaboration among data producers, processors, and users in the tourism sector. Jordan is fairly well equipped with primary data for tourism analysis, with the visitor surveys, the ongoing surveys of economic activity, and the regular reporting to MOTA by registered tourism businesses. However better use could be made of the available data by many of the tourism actors. One of the concerns here is that many people who should be relying on the available data, particularly in development of the tourism strategy, do not know that they are available, or do not have a clear sense of how statistical data could actually inform their decision-making. This is not a problem that is solved by looking to other countries to see what indicators they create; it is solved by identifying the decisions to be made or goals to be achieved at home, and determining what information would facilitate making those decisions in as informed a manner as possible.

A useful strategy to move in this direction may be the creation of a working group on tourism data and indicators. Such a group should probably include representatives from MOTA, JTB, DOS, the Central Bank, JIB, the tourism industry associations, ASEZA, and JTD II, as well as any other organizations interested in participating. Such a group would provide a venue through which to undertake several tasks:

- Fully document and exchange information about the existing primary data collection and data flows among tourism-related agencies in Jordan.

- Work with current or (more likely) potential data users to determine what information can help them make decisions, design strategy, or evaluate progress more effectively. Part of the challenge here is that even among the most data-literate member of the tourism community, few people are actually working with the available information as fully as they could. There is considerable reluctance to work with the databases themselves rather than with published summary statistics, which means that much of the valuable information in the databases is wasted. For those who are reluctant to query the databases directly, it is important to at least understand what the databases offer, so that they can ask others to do it for them. This is not happening.

- Decide what indicators are most useful, who will calculate and publish them, and how. It is important that when indicators are published, they be accompanied by clear explanations of how they were calculated and what they mean, so that they are not misinterpreted. In cases where several variants may exist of the same measure (e.g. average length of package tours vs. average length of hotel stays vs. average length of stay in the country), the differences must be clear so that users will know which measure is important for their purposes.

- Design the next NTVS questionnaire and other data collection tools. As discussed above, this should be a collaborative venture; the working group provides a logical framework within to carry it out.

- Consider the creation of a consolidated tourism data center to manage tourism statistics and indicator production. While it is clear that better coordination is needed on the management of tourism data and production of reports and indicators, a single data center is not necessarily the best way to do this. As the working group gains experience addressing the issues

together, they should develop a sense of whether the best way to ensure good use of information is through strengthened coordination among the existing institutions, or by reallocating functions and consolidating data activities within a single institution.

ANNEXES

A.   NUMBER OF VISITORS

The three measures of number of visitors – arrivals (day and overnight), number of overnights, and length of stay – are related to each other.   The primary data collection is at the visitor level; for all or a sample of visitors we will know who arrived and how long they stayed. From the individual length of stay we can calculate total overnights. Total overnights is then divided by number of arrivals to calculate average length of stay.[2]

Insofar as possible, we would like to know all three of these by month, region of nationality, country of nationality, country of residence, package tour vs. independent, and purpose of travel. This level of detail will provide a good basis for understanding who comes to Jordan and designing a tourism strategy and marketing approach accordingly.

Five sources of data shed light on these variables.

Border Crossing Data:

 The primary source for information on people arriving in the country is the border police, which in Jordan is part of the General Intelligence Department (GID). They record every person entering and leaving the country. Each month they send a report to MOTA listing, for each country in the world, the number of people of that nationality who arrived and who left Jordan.

In principle, GID should be able to link the arrival to the departure of individual visitors, and thus measure length of stay; however if they do that, they do not provide the data to MOTA. In principle they should also be able to link the visitor information that hotels give them to the arrival and departure information about each visitor, using nationality and passport number to connect individual data. This would make it possible to track the itinerary within Jordan of all visitors staying in hotels that correctly report to the police. If GID makes this link, however, the data are not provided to MOTA.   Thus the only GID data available for tourism purposes is the number of arrivals and departures each month by people of each nationality. Most of the people interviewed in the course of this consultancy considered it highly unlikely that GID would be willing to provide any more border crossing data than they are now providing.

The GID data pertain to everyone who arrives in or leaves the country; however not all of them are visitors or tourists as defined by WTO. Surveys of foreign visitors to Jordan are carried out when the visitors leave the country. Thus when linking survey data to GID data, we must use the data about those leaving the country rather than those arriving. The table below shows the relationship between total departures from Jordan and the WTO definitions of visitors and tourists.

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[2] Total number of visitors and number of overnights are indicators recommended by WTO, in Table 10 of the TSA. Average length of stay is not a WTO recommended indicator, but is of obvious important in Jordan and probably other countries.

	Total departures
less	those who live in Jordan
less	immigrants
less	people who own businesses in Jordan
less	workers crossing the border for employment
less	transit passengers (those passing through)
equals	**Total visitors according to WTO definition**
less	day visitors
equals	**overnight visitors, or tourists according to WTO definition**

National Tourism Visitor Survey (NTVS) inbound survey:

The NTVS, conducted from July 2006 to June 2007, surveyed 42,266 foreign visitors, collecting detailed data on many subjects.[3] The Department of Statistics (DOS) extrapolated these responses from the sample of 42,266 to the total population of foreign visitors (in the WTO definition) who arrived in the country over the same twelve-month period. With this sample size, the extrapolations to the entire population should be highly accurate; the overall estimate of such variables as purpose of travel will have more than a 99% probability of being within 1% of the actual purpose of travel for the whole population. Thus the fact that this is a sample survey rather than a full census of all tourists is not a concern when estimating values that apply to all visitors to Jordan. However data about small subsets of the whole population, such as, say, the purpose of travel of visitors from Switzerland, *will* be inaccurate, as there are only 129 Swiss people in the sample. A sample of 42,266 is very large and we can have confidence in extrapolations to the whole population of visitors; a sample of 129 is not large enough to generalize about all visitors from Switzerland.

The Department of Statistics (DOS) has produced a report summarizing the results of the 2006-7 NTVS which does include many of those disaggregations. Their summary tables are available on their website at http://www.dos.gov.jo/sdb_ec/sdb_ec_e/index.htm; the printed report can be obtained from DOS.

The NTVS lets us calculate arrivals, number of overnights, and length of stay by nationality, country of residence, package tour vs. independent, and purpose of travel, except where detailed breakdowns are not possible because the sample size is too small (e.g. monthly data by country of residence). This enables us to produce tables like the following:

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[3] The NTVS inbound tourism survey form is included in Annex G.

Number of visitors by Nationality								
	Jan-09			…		Dec-09		
	Day visitors	Overnight visitors	Total			Day visitors	Overnight visitors	Total
Total Departures				…				
Jordanian				…				
Gulf				…				
country list here				…				
Other Arab				…				
country list here				…				
Other				…				
country list here				…				

Number of Arrivals by Country of Residence			
	2009 Total		
	Day visitors	Overnight visitors	Total
Total Departures			
Jordanian			
Gulf			
country list here			
Other Arab			
country list here			
Other			
country list here			

Number of Overnights and Average Length of Stay by nationality								
	Jan-09			…		Dec-09		
	Number of visitors	Total overnight	Average Length of Stay			Overnight visits	Total overnight	Average Length of Stay
Total Departures				…				
Jordanian				…				
Gulf				…				
country list here				…				
Other Arab				…				
country list here				…				
Other				…				
country list here				…				

Number of Overnights and Average Length of Stay by country of residence			
	2009 Total		
	Number of visitors	Total overnight	Average Length of Stay
Total Departures			
Jordanian			
Gulf			
country list here			
Other Arab			
country list here			
Other			
country list here			

Number of Overnights and Average Length of Stay by package tour vs. independent and country of residence						
	Package Tour			Independent		
	Overnight visits	Total overnight	Average Length of Stay	Overnight visits	Total overnight	Average Length of Stay
Total Departures						
Jordanian						
Gulf country list here						
Other Arab country list here						
Other country list here						

Number of Overnights and Average Length of Stay by Purpose of Travel			
	Overnight visits	Total overnight	Average Length of Stay
Vacation or Leisure			
Visiting friends or relatives			
Business tour			
Conference or seminar			
Medical treatment			
Study			
Crew members			
Military personnel			
Other (specify)			
Total			

Domestic Tourism Visitor Survey:

For the first time in 2008, the biennial Household Employment and Income Survey (HEIS) gathered information about domestic tourism, through the Domestic Tourism and Visitor Sector.[4] Like the NTVS, both the HEIS and the DTVS are sample surveys, rather than censuses of all Jordanian households. In 2008, 48,299 households completed the survey, indicating whether they took any trips over the year, and if they did, providing details about each trip separately. DOS then extrapolated their responses to the entire population of Jordan. The sample is large enough to provide a wealth of information about overall travel patterns and about many subsets of Jordanian travelers, such as those traveling on holiday or to visit friends. However in some categories it does not include enough data to generalize about the full population; for example, it includes less than fifty trips for medical care or for study, which does not allow us to analyze the expenditures or travel patterns of those groups in detail. As of the writing of this report (November 2009), the survey results had not yet been publicly released, but they should be available soon.

The DTVS can easily be used to complete the tables above, omitting of course the disaggregation by nationality or country of residence. Very few Jordanians travel in their own country on package tours, but disaggregation by purpose of travel is straightforward and interesting.

The DTVS data can also be disaggregated by type of lodging. Since many Jordanians rent apartments when on holiday, own second homes, or stay with friends, this is important for understanding their impact on use of hotels and other tourist facilities.

Hotel data reported to MOTA:

All classified hotels report monthly to MOTA, providing data on arrivals, overnights, and length of stay by nationality. Since they are not based on a sample survey, these data should be more accurate than the NTVS data to the extent that hotels report correctly. However some hotels may report fewer visitors than they actually have, because they fear that this reporting will be correlated with their tax returns, and they are reporting less than their actual

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[4] A copy of the DTVS questionnaire is included in Annex I.

income for tax purposes. To the extent that this occurs, the hotel data will be lower than the actual number of people staying in hotels.

The hotel numbers are not consistent with the data in the two surveys (NTVS and DTVS). The NTVS includes Jordanians who live abroad, but does not include Jordanians who live in their own country. The hotel data include all Jordanians. Hotels collect nationality but not country of residence, so there is no way to distinguish those Jordanians who have come from abroad from those who live in Jordan. This means that we would expect the hotel night numbers from the hotel data to be higher than the corresponding figures from the NTVS. If we add the hotel data from NTVS and DTVS, we would expect that total to approximate the values provided by the hotels themselves.

In fact, estimates of total hotel overnights from the NTVS and DTVS data are far higher than those from MOTA for the time period covered by the NTVS. The NTVS alone gives about 6.7 million hotel bed-nights in 2006-7, while the MOTA data give about 3.9 million. (Because the DTVS is for 2008 rather than 2006-7, adding the two surveys directly is inaccurate; however the DTVS indicated that Jordanians at home accounted for about 185,000 hotel-nights nationwide in 2008.) Not only is this discrepancy greater than would be expected simply from the treatment of Jordanians, but it is in the wrong direction. Underreporting by hotels is in the right direction to lead to this kind of result, but could not be sufficient to cause such a large discrepancy. Both the MOTA data and the survey data are very important; tourism stakeholders in Jordan cannot simply decide that one is accurate and dismiss the other. It is essential, therefore, that everyone involved in producing these data and perhaps some other stakeholders – MOTA, DOS, JHA, JTB, the Jordan Tourism Development Project, ASEZA – work together to determine the source of these discrepancies. This is necessary both in order to use the surveys already completed, and to ensure that when they are updated the same errors do not emerge.

The difficulties in linking the MOTA and NTVS data would certainly be somewhat simplified if hotels collected information about country of residence as well as nationality. For hotels that ask clients for a home address, they already have this information; all that would change would be the data that they report to MOTA. Where hotels do not currently ask for a home address, they would have to modify their registration forms to ask for country of residence, and also begin reporting that to MOTA.

In addition to the huge discrepancies between MOTA and NTVS data, there are moderate discrepancies across the MOTA tables on hotels occupancy. MOTA receives data from each hotel, enters them in an MIS system, and then produces a number of reports which are published on their website. Figures which should be identical across tables in fact are not. For example, in their table 6.3 for 2008, they give total hotel bed nights in Jordan as 5,762,432. In Table 6.8 the same value for the same year is given as 4,798,314. Similar discrepancies appear in the bed nights in each location across the same pair of tables. Hotel night data from Aqaba are reported to ASEZA, which then prepares summary tables and passes these on to MOTA. The ASEZA total for bed nights for Aqaba in 2008 is different from either of the MOTA values. If in fact MOTA does not have the underlying hotel-level data for Aqaba, and only has the summaries produced by ASEZA, this may be the cause of some discrepancies in the data. However is essential that within MOTA and between MOTA and ASEZA all discrepancies across the tables be identified and resolved.

Package Tour Numbers:

Jordanian tour operators report monthly to MOTA on their trips, providing data on number of people of each nationality and the start and end dates of the tour. The structure of the data now provided is such that it is not actually clear who is on the same trip. The operators provide one record of data about each group of people of the same nationality who begin and end their trip on the same day. However, there is no way to determine whether, say, ten Swiss people who started and ended their tour together, and ten Japanese who also started and ended on the same days, were all traveling together in one group of 20 or formed two separate groups of ten each.

MOTA publishes data on the total number of people on package tours by nationality, number of overnights on package tours, and average length of tours. The figures for length of tours are, not surprisingly, different from the length of stay based on hotel data. Since many visitors stay in more than one town, their length of stay in any one hotel will always be lower than their stay in the country. The average length of package tours, from the tour operators, also differ markedly from the average length of stay from the NTVS data, which are shown in the table below:

NTVS average length of stay in 2006-7, for package tours and independent travelers		
Purpose of Travel	Package Tour	Independent Traveler
Vacation or Leisure	5.8	8.0
Visiting friends or relatives	14.0	17.1
Business tour	3.0	6.1
Conference or seminar	6.0	6.4
Medical treatment	7.0	10.3
Religious visit	6.9	7.8
Diplomat	1.0	40.6
Study		51.4
Crew members		3.7
Military personnel		24.9
Other (specify)		12.5
Overall average	5.83	13.74
Overall average, all visitors	13.59	

The tour operators, in contrast, show an average tour length of 4.2 days in 2006 and 4.4 days in 2007. We should not expect these to be the same. The NTVS data include Jordanians coming home to visit friends and family, who neither stay in hotels nor go on package tours, and who typically to stay much longer than people on vacation. Even controlling for purpose of travel, the NTVS data show longer stays for vacationers than do the MOTA data. Independent travelers may simply stay longer than those on package tours. And those on package tours may spend a few nights in Jordan before or after their tour, leading to longer overall stays than the length of the tour itself.

The number of people from package tours can also be calculated from the NTVS data, for comparison with the MOTA data from the tour operators. As with the hotel data, the MOTA and NTVS figures differ wildly. However, where the NTVS shows almost twice as many hotel nights as the hotels report, the NTVS shows far fewer package tourists than the tour operators report. For 2006-7, MOTA reports 318,983 people on package tours, while the NTVS shows 179,790. Of the NTVS figure, 71,180 are on overnight tours and the remainder on day tours. (The MOTA data do not distinguish day excursions from overnight tours.) As with the hotel bed-night discrepancies, it is important that MOTA, DOS, and the other stakeholders work together to determine the reason for this difference.

WTO Recommendation on visitors by mode of transport

In Table 10 of the TSA, WTO recommends disaggregating inbound visitors by mode of transport as follows:

B. Inbound tourism: Number of arrivals and overnights by means of transport		
	Number of arrivals	Number of overnights

1.Air
   1.1 Scheduled flights
   1.2 Unscheduled flight
   1.3 Private aircraft
   1.4 Other services		

2. Waterway
   2.1 Passenger lines and ferries
   2.2 Cruise ships
   2.3 Yacht
   2.4 Other		

3. Land
   3.1 Railway
   3.2 Motor coach or bus and other public road transportation
   3.3 Vehicle rental with driver
     (i) taxis, limousines and rental private motor vehicle with driver
     (ii) Rental of man or animal drawn vehicle
   3.4 Owned private vehicle
   3.5 Vehicle rental without operator (up to 8 pers.)
   3.6 Other modes of land transport (horse back bicycle, motorcycles, etc.)
   3.7 On foot		

TOTAL		

This type of detail has not been identified by anyone in Jordan as being of high priority; the fact that WTO recommends does not on its own seem to justify completing this table. However, if desired it is easy to complete based on readily available data. Each Jordanian border point includes visitors using only one overall mode of transport, so disaggregating between those arriving by air, road, and water is straightforward. MOTA summary tables present total arrivals data (though not the number of overall visitors, day visitors, or overnight tourists) by border point and mode of transport. If desired, it would be straightforward to use the NTVS data to estimate total visitors, day visitors, and overnight tourists by mode of

transport. It would also be possible to use NTVS data to calculate number of overnights by mode of transport.

Outbound visitors

In addition to measuring visitors to Jordan from abroad, the NTVS surveyed residents of Jordan who leave the country.[5] DOS surveyed 27,439 people returning from abroad and extrapolated the responses to the total population of 2.44 million Jordanian residents who traveled abroad over the same twelve-month period. As with the inbound survey, the sample is large enough that extrapolations to the entire population should be highly accurate. Again, however, data about small subsets of the whole population, such as those going to a single destination, may be inaccurate. In general, if the sample is less than about 100, the results are likely to be inaccurate.

For most Jordanian purposes (tourism strategy, marketing, and ongoing planning), the outbound data are much less important than the inbound data. They are essential for the Balance of Payments accounts, however, to balance the foreign exchange receipts from tourists coming to Jordan with the foreign exchange payments by Jordanian residents going to other countries. As with the inbound survey, the Central Bank is extrapolating the 2006-7 survey data to subsequent years to estimate expenditures abroad.   This is done in a similar way; the only significant difference in methodology is that instead of adjusting expenditure figures using the Jordanian consumer price indices, they adjust them using world average consumer price indices, since the expenditures are made in other countries.

The outbound data are a key element of the TSA (Table 3), and will be included when Jordan completes its TSA work.

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[5] A copy of the NTVS outbound survey questionnaire is included in Annex H.

B. MONETARY INDICATORS: THE DEMAND SIDE

Monetary indicators on the role of tourism in the economy build up to the calculation of the share of tourism in GDP, through the sequential construction of the TSA tables. This explanation therefore follows the tables. This section focuses on the demand side, considering how much tourists spend in Jordan. The next section addresses the supply side, considering both the calculation of the tourism share of GDP and an array of non-monetary indicators.

B.1 Consumption by foreigners visitors in Jordan[6]

This indicator measures total expenditures by foreign visitors to Jordan, and is the same as the travel receipts item in the balance of payments accounts or foreign exchange earnings from tourism. It is a key national indicator because it represents increased income to the economy as a whole; an increase in international tourism consumption does not mean a decrease in some other consumption within the economy. It is also a major source of demand for the products of the Jordanian tourism industry.

"Foreign visitors" are defined by their country of residence, not by their nationality. This is consistent with the SNA definition of residence; a person is resident in the country that is their regular place of economic activity. This means that Jordanians living in other countries are resident in those countries for SNA statistics; they are not classified with Jordanians who live in their own country.

The NTVS data can be disaggregated by expenditure category; lodging, food and beverages, transport, services of travel agents and tour operators, entertainment, and so on. This is useful for planning purposes, since it allows both the public and the private sector to anticipate increases in demand from specific sectors as tourism grows over time. It is also essential in order to calculate the share of tourism in GDP; this is discussed below in the section on supply side indicators.

The base data on consumption by foreign visitors come from the NTVS, and cover the period from July 2006 to June 2007. Expenditures for subsequent years are estimated by the Central Bank, based on a number of other data:

- GID data on people departing from Jordan by region of nationality for the year in question
- Share of Jordanian residents and non-residents among those leaving the country, from NTVS
- Share of people in transit among non-residents leaving the country, from NTVS
- Share of overnight visitors and day visitors among non-transit visitors, from NTVS
- Total expenditure from NTVS, disaggregated into overnight and day visitors, region of nationality, month of departure from Jordan, and item purchased
- Jordanian consumer price indices for food, lodging, transport, entertainment, and other categories of expenditures

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[6] This is Table I of the TSA.

Using all of these inputs, they estimate expenditure in the current year on each item, for each group of visitors. These are totaled to arrive at total expenditure by inbound tourists in the current year. This total is published on the MOTA website, disaggregated only by month and regional of nationality. The Central Bank also records this information in the Balance of Payments accounts, which are published on their website (see discussion below on indicators of balance of payments impacts of tourism).

When the next visitor survey is carried out, the 2006-7 data will be updated and the process begun again with a more current base. No definite plans are in place yet for carrying out the next NTVS; the earliest possible year for the next survey is 2011.[7]

B.2   Domestic tourism consumption

This indicator measures total consumption by Jordanians traveling within the country. It includes both expenditures on trips whose destination is within the country and expenditures while traveling in-country en route to trips overseas, such as travel from the countryside to the airport prior to flying abroad. This is important from a regional perspective, since it transfers income from one part of the country to another. It is also important to the tourist industry, since Jordanians are consumers of their products just as foreigners are. It does not increase the total income of the country, however, and is therefore less important from the perspective of how tourism stimulates the national economy as a whole.

Domestic tourism consumption is calculated from the DTVS. Like the NTVS data, these can be used to calculate total or daily expenditures by purpose or according to other information in the questionnaire. Assuming that DOS continues to include the DTVS in the HEIS, the data will be updated every two years. The values could be extrapolated to cover intermediate years based on population and other demographic data.

B.3   Consumption by Jordanian residents abroad (WTO)

This indicator measures how much residents of Jordan spend when they leave the country, and is the same as the travel payments item in the balance of payments accounts. To understand the foreign exchange impacts of tourism, it is useful to present the receipts and payments items together. However from the perspective of managing the Jordanian tourism industry and stimulating the Jordanian economy, consumption by Jordanians abroad is not a high priority indicator.

Expenditures by Jordanians abroad are based on the outbound tourism survey, which is the second part of the NTVS. As with the inbound survey, the Central Bank is extrapolating these data to subsequent years to estimate total payments (expenditures abroad) for the balance of payments accounts. Also like the outbound survey, expenditures abroad can be disaggregated by product purchased; however this information is less important for national tourism planning than is the detail on inbound expenditures.

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[7] JTB is currently carrying out a more limited inbound visitor survey that follows up on questions in the 2006-7 survey; the full text of that survey is included in Annex J. However, this is designed to evaluate their own marketing activities, and only targets visitors from countries in which they are active. Consequently it will not provide comprehensive expenditure data with which to update the TSA tables. It will provide interesting feedback on visitor satisfaction and product quality, discussed elsewhere in this report.

B.4   Average daily consumption

Average daily expenditure disaggregated by visitor groups is useful information for the design of a marketing strategy, since targeting high spenders may be more lucrative than targeting others. The likely categories for disaggregation include:

- Purpose of travel
- Country of residence
- Country of nationality
- Package tour vs. independent traveler

The calculation of daily expenditure depends on using data on both total expenditures and total tourist overnights for the different groups of interest. All of these values can be calculated from the NTVS or DTVS, although attention must be paid to the sample size of subgroups; where they are too small, the results will not be reliable.

Daily expenditure rates can be updated using the consumer price index data published by the Central Bank, although for comparing expenditure rates across groups of visitors this is not necessary. Meaningful updating of these data will be available when the next NTVS is carried out; as mentioned above, the earliest this could be done would be for 2011.

Neither the NTVS nor the DTVS includes enough detail about purpose of travel to examine expenditures according to the market segments of interest for the upcoming tourism strategy. This is a result of the design of the two surveys; neither includes enough detailed information about purpose of travel or the activities in which tourists engaged to determine which segment they would fall into. For future surveys, additional detail can be introduced in order to capture this information.

B.5   Internal tourism consumption

This is the sum of income from international and domestic consumption, and captures the total stimulus to the economy from all tourism. It is presented in Table 4 of the TSA; the details are discussed above.

C.   MONETARY INDICATORS: THE SUPPLY SIDE

C.1   Production of tourism characteristic and connected industries

The TSA organizes the products purchased by tourists into several categories:

- "Tourism characteristic products" are items usually purchased by tourists; hotels, transport, restaurants, cultural sites, souvenirs, and so on. Tourism characteristic industries include the companies that typically produce these items.
- "Tourism connected products" are items not globally associated with tourism, but that are crucial in particular countries. For example, in Jordan the services of Dead Sea spas may be regarded as tourism-connected products, since their patrons are overwhelmingly either domestic or foreign tourists; in other countries, on the other hand, spa services might not be particularly interesting to tourists at all. This makes them a tourism connected service for Jordan, but they would not be tracked at all by other countries' TSAs.

This indicator measures the total output of the industries producing characteristic and connected products, whether or not their output is actually purchased by tourists. It is therefore higher than a measure of the output actually due to tourism. The list of tourism characteristic products included in the TSA is shown in the table below.

Tourism characteristic and connected products in the TSA
A.1 Characteristic products
1 – Accommodation services for visitors
1.1 – Hotels and other accommodation services for visitors other than 1.2
1.2 – Accommodation services associated with all forms of vacation home ownership
2 – Restaurants and similar
3 – Passenger transport services
3.1 Railway passenger transport services
3.2 Road passenger transport services
3.3 Water passenger transport services
3.4 Air passenger transport services
3.5 Transport equipment rental
4 – Travel agencies and similar
reservation services provided by travel agencies (1)
reservation services provided by tour operators (2)
other reservation services
5 – Cultural services & 6 – Sports and recreational services
of which: cultural services
7 – Tourism characteristic goods (3)
8 - Other country specific tourism characteristic services
A.2 Connected products
Services

Data on industrial production in Jordan come from annual sample surveys carried out by DOS. Two surveys are relevant to tourism:

- Commercial Enterprises Survey (ES-S); this includes hotels and restaurants.
- Transport, Storage, and Communications (ES-T); this includes transport and travel agencies

The data from these surveys are extrapolated to cover all Jordanian industry, and are the basis for constructing Jordan's national income accounts. Specific information from the surveys pertaining to tourism characteristic and connected products must be summed to complete TSA Table 5, which covers the production of those industries. Since the total figure is the sum of the different component industries, obtaining data by industry sector is clearly easy; these industry totals are needed in order to calculate tourism value added (discussed below). DOS has not yet completed TSA Table 5, so this indicator is not currently available; however the data do exist with which to do it. DOS carries out these surveys annually, so this indicator can be calculated every year.

The samples for the enterprises represent around 8-10% of all firms. This is not large enough for the data to be accurate if disaggregated to the governorate level. Therefore tourism production cannot be calculated below the level of the national economy. If detailed production data were desired, for example by ASEZA, it would be necessary to enlarge the sample considerably, at least in the regions interested in production data.

C.2 Value added (VA) from tourism characteristic and connected industries

Value added from an industry sector measures the contribution of that sector to GDP. This indicator tells us how much the tourism-related industries contribute to the economy; it does not take into account how much of their output is actually purchased by tourists.

For each industry sector, VA is calculated as follows:

Total Output	This is the value of output calculated in the previous indicator for each tourism characteristic or connected product.
Consumption of intermediate inputs 0. Agriculture, forestry and fishery products 1. Ores and minerals; electricity, gas and water 2. Food products; beverage and tobacco, 3. Other transportable goods, except metal 4. Metal products, machinery and equipment 5. Construction and construction services 6. Distributive trade services; lodging; food and 7. Financial and related services; real estate 8. Business and production services 9. Community, social and personal services	These rows indicate how much firms in the industry bought from other firms in the economy. The level of sectoral detail at which this information is collected may vary from one country to another; this table shows only a moderate level of detail. This is the level of detail that WTO recommends in the TSA.
Total intermediate consumption	This is the sum of all the intermediate consumption; it is *subtracted from* the value of output.
Total gross value added at producers' prices	This is value added from the industry in question. It is referred to as "gross" value added because it includes depreciation of the firm's capital assets (buildings, equipment, etc.). If depreciation were subtracted out, this would be called "net" value added.
The items below this row are *included within value added*.	
Compensation of employees	Salaries and other income and benefits received by the company's (or sector's) workers.
Other taxes less subsidies on production	Taxes paid to the government minus any subsidies received from the government. If this line item were subtracted out, the resulting total would be "total gross value added at basic prices."
Gross operating surplus	Profit of the company or sector

Thus the value added of a firm (or an industry sector) includes the value of its output minus the value of what it buys from other firms. Its payments to its employees are included in value added.

Value added from tourism characteristic and connected industries is the sum of the value added of the component industries.

C.3   Tourism value added (TVA)

Tourism Value Added is the contribution of tourism to GDP, the key overall measure of the role of tourism in the economy. It is calculated in Table 6 of the TSA. This indicator is of considerable interest to everyone working on tourism in Jordan. It is different from the value added of tourism characteristic and connected industries (discussed above) because it only includes the share of that VA that is actually attributable to tourism. Thus, for example, for the restaurant sector, VA would be the total contribution of the sector, and TVA would be the economic contribution from restaurant meals purchased by tourists.

TVA is calculated in several steps.

Step 1. Calculate a tourism coefficient for each characteristic or connected industry. This is based on the consumption by tourists of each product and the production of each product by the tourism industries. The table below details, this, with an example for how it applies to a typical product, restaurants.

Calculating the tourism coefficient:		
	definition	example
numerator:	Internal consumption of the product in question	Expenditure of foreign visitors to Jordan in restaurants, from the NTVS *plus* expenditure of Jordanians traveling at home in restaurants, from the DTVS
divided by		
denominator:	Total output of that product	Total revenues of Jordanian restaurants, from DOS enterprise surveys

This approach will lead to a series of coefficients, for hotels, restaurants, transport, entertainment, and so on.

Step 2. Calculate value added (VA) for each sector, as discussed above.

Step 3. Apply the sector's tourism coefficient to calculate the sector's TVA. For each tourism characteristic industry, multiply value added by the coefficient for that sector to get that sector's TVA. For example,

$$\text{tourism coefficient for restaurants} \quad X \quad \text{restaurant sector value added} \quad = \quad \text{TVA for restaurants}$$

Step 4. Sum the TVAs for the different tourism sectors to get total tourism value added. This is the contribution of tourism to GDP.

TVA, along with the rest of the TSA, must be calculated by DOS, because they conduct the surveys on which it depends and they build the national income accounts. They have not yet completed the TSA or calculated TVA, but they do have the data with which to do it, from the NTVS, the DTVS, and the surveys of commercial enterprises.

TVA can be updated when the underlying surveys are updated, or when indicators from the surveys (such as total consumption by inbound tourists) are extrapolated between survey years based on the number of tourists coming to the country. While some countries may produce a new TSA, and thus a new estimate of TVA, every year, many countries only update the TSA when they actually redo their inbound visitor survey. Once Jordan has completed its first TSA, a decision can be made as to whether to update it each year based on extrapolations from the visitor surveys, or to wait until the next NTVS is conducted to compile a new TSA.

Other measures related to the share of tourism in GDP

Because there is so much interest in tracking the role of tourism in the Jordanian economy, other indicators may have been put forward to measure it. These can easily be confused with TSA, so it is important to be aware of them and understand how they differ from TVA:

Ratio of tourism consumption to GDP: This ratio can easily be calculated from available data, in this way:

internal tourism expenditures		Total expenditure by inbound tourists, published by MOTA *plus* Total expenditure by domestic tourists, which will soon be available from DOS *(previous calculations of this ratio have only included expenditures by inbound tourists)*
divided by		
GDP		Calculated by DOS and available on their website as well as elsewhere

The table below calculates this ratio for 2000 through 2007, based on data from DOS and the Central Bank. (These values may differ slightly from those seen elsewhere in Jordan; those ratios may have been calculated using more current GDP figures not yet available on the DOS website.)

Ratio of Travel Receipts to GDP, 2000-2007								
Year	2000	2001	2002	2003	2004	2005	2006	2007

GDP	5998	6363	6790	7228	8090	8941	9997	11225
Travel receipts	512.4	496.1	743.3	752.6	942.8	1,021.4	1,460.8	1,638.3
Ratio of travel receipts to GDP	0.09	0.08	0.11	0.10	0.12	0.11	0.15	0.15
Sources:	GDP Data from Department of Statistics Website. Figures for 2006 and 2007 are provisional							
	Travel Receipts from the Central Bank of Jordan website, balance of payments data							

Because total tourism expenditures are considerably higher than tourism VA (they include the intermediate consumption which must be subtracted to calculate VA), this ratio is an overestimate of the actual contribution of tourism to GDP. As a way to observe change over time in the role of tourism in the economy, this ratio can be useful, and of course it is much easier to calculate than TVA. However it must not be confused with TVA, or taken to show the actual economic contribution of tourism to the economy. Although over time this ratio may evolve in the same way as TVA, in any given year it is much higher than TVA.

Value added of tourism characteristic industries as a share of GDP: If Jordan had no NTVS, the country could still calculate VA for tourism characteristic industries, as discussed above and presented in Table 5 of the TSA. Like the ratio of tourism expenditures to GDP, this ratio is also an overestimate of the actual contribution of tourism to GDP, because it includes full value added of the key sectors rather than only the share which can be allocated to tourism.

Calculations of TVA and other TSA indicators carried out by the World Travel and Tourism Council (WTTC): WTTC routinely publishes TSA data for all countries of the world. They are free and easily found on the internet - those for Jordan for 2009 are at http://www.wttc.org/ bin/pdf/original_pdf_file/jordan.pdf. They are produced through a propriety economic model, so it is not possible to determine exactly how WTTC has calculated them. Moreover, WTTC does not have access to the key primary data needed to build the Jordanian national accounts or its TSA – the NTVS, the DTVS, or the economic surveys. They are simulating the tourism accounts based on aggregate figures that are public, such as the GDP and the receipts and payments on travel from the Balance of Payments accounts, but they do not have the underlying databases needed to actually construct the TSA.[8] While the indicators published by WTTC may be better than nothing, and do offer a rough basis for comparison with other countries, they should not be regarded as reliable measures of the Jordanian tourism sector.

C.4   Employment from tourism

Employment from tourism is a key indicator of the contribution of tourism to the economy. As with tourism value added, the tourism coefficients (discussed above) may be needed in order to determine how much of the employment in tourism characteristic and connected industries should actually be allocated to tourism.

The TSA includes the following table for information about employment.

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[8] WTTC, 2009, "Methodology for Producing the 2009 WTTC/OE Travel & Tourism Economic Impact Research using a simulated Tourism Satellite Account Framework." This paper can be downloaded here: http://www.wttc.org/bin/pdf/original_pdf_file/2009_methodology.pdf

TSA Table 7 – Employment in Tourism Characteristic Industries													
Tourism industries	**No. of firms**	**Status in employment**									**Hours worked**		
		total			**employees**			**other**			**total**		
		M	F	**Total**	M	F	**Total**	M	F	**Total**	M	F	**Total**
1 –a. Hotels 1 – b. Second homes		X	X	X	X	X	X	X	X	X	X	X	X
2 – Restaurants													
3 – Railways													
4 – Road transport													
5 – Water transport													
6 – Air transport													
7 – Transport equipment rental													
8 – Travel agencies													
9 – Cultural services													
10 – Sports and recreation													
11 – Retail trade, tourism characteristic goods													
12 - Other country specific characteristic activities													
TOTAL													

X   does not apply

Jordan has two different sources of information about tourism employment.

DOS data: DOS annually conducts an employment survey through which they collect data for each firm about the number of employees in each occupational category, including gender, nationality, whether they are permanent or temporary, how much they are paid, and total hours worked. As with all surveys, the sample data are extrapolated to estimate values for all Jordanian enterprises, and the sample is large enough for the results to be reliable. Some of the summary data from these surveys are available on the DOS website at http://www.dos.gov.jo/sdb_ec/sdb_ec_e/index.htm.   The published summaries provide information for hotels and restaurants combined. For other sectors, such as transport and entertainment, tourism is too small a share for the published summary figures to be useful for tourism purposes.

In order to complete the TSA table, the data must be organized by ISIC code, and the appropriate information totaled for the tourism characteristic industries. To determine the share of employment actually attributable to tourism, the employment in these sectors must be multiplied by the tourism coefficients discussed above, as with value added and other measures. These data cover all Jordanian industry; however if the sample is too small for the

specific ISIC codes related to tourism, the details (e.g. gender breakdown or permanent vs. temporary) may not be accurate.

MOTA data: Certain enterprises that serve tourists must receive a permit from MOTA in order to operate. When they apply for their annual permit, MOTA collects data about the number of employees by gender and nationality (Jordanian vs. non-Jordanian), compensation of employees, educational levels, and occupational categories. The firms which require MOTA permits are:

- Hotels that are classified from one-star to five-star. This includes most hotels where foreign tourists are likely to stay, though it does not include all hotels in the country.
- "Tourism restaurants." In order to sell alcohol, restaurants must be classified as "tourism restaurants" and must have a permit from MOTA. Even for restaurants not interested in selling alcohol, the inspections required for MOTA permitting are apparently simpler than those required for other restaurants, so there may be an incentive to obtain a MOTA permit. MOTA permitting may also help some restaurants attract tour groups, an additional incentive to register with MOTA. However many restaurants, especially low-budget ones, will not do this.
- Tourism buses. These are charter buses rented by tour operators in order to transport tour groups around the country. They also include the special luxury buses targeting independent tourists, and covering routes such as Amman to Petra. They do not include other charter buses or regularly scheduled bus routes commonly used by Jordanians.
- Travel agents; all of them must have MOTA permits
- Souvenir shops; it is not clear how these are identified or defined.

In addition, MOTA is in the process of establishing a permit requirement for car rental companies that rent to tourists, but this is not yet in place.

Based on these registrations (and other sources, for rental cars, dive centers, and water sports), MOTA publishes data on its website about the employment in the following types of enterprises:

Hotels
Travel Agencies
Tourism Restaurants
Rent a Car Offices
Tourist Shops
Tourist Guides
Horses Guides
Tourist Transportation
Diving Centers
Water Sports

They are not publishing data on employee compensation, but since this asked by their permitting form, it should be available if desired. These data presumably cover all of the firms that are permitted by MOTA, but except for guides and tourist buses, there is no reason to expect either that all tourist purchases are made within these firms, or that all purchases in these firms are made by tourists. Trends over time in employment in these firms may track well with employment generated by the purchases of tourists, but the actual employment in these firms in a given years does not necessarily represent the employment created due to tourist demand.

Comparison of DOS and MOTA data: The two data sources attempt to do different things. DOS data are only a sample, but one that represents the entire economic sectors of interest. MOTA data include all firms, but within a subset of the economic sectors that is not compatible with other economic statistics. In principle, the DOS data will provide a more accurate estimate of tourism employment and compensation, if the samples are large enough for the sectors of interest. If they are not, it may be useful to consider asking DOS to specifically target tourism characteristic industries with a larger sample, so that these data will be accurate enough to calculate tourism employment.

Neither the MOTA nor the DOS data sheds any light on seasonal employment in tourism characteristic industries. Given the strong seasonality of tourism patterns, this may be an issue. If desired, it may be feasible to modify either DOS or MOTA forms so as to obtain this information.

C.5   Tourism capital formation (investment)

Investment in the tourism sector is an important predictor of how it is expected to grow in the future. This is included in Table 8 of the TSA. It is organized by industry sector (the tourism characteristic industries plus government investments and "other") and by product (e.g. hotels, restaurants, road infrastructure, vehicles, buildings for cultural services, etc.), showing how much each sector invests in each product. The major indicator would be total investment; those interested in the details can see them by industry and product. It distinguish domestic from foreign investment, however.

Data on domestic investments in tourism are available from the survey of commercial enterprises, and can be summarized for tourism characteristic enterprises. These data provide both gross and net investment as well as the change in value of the sector's capital assets over the year. (Net investment is gross investment less depreciation.)

Foreign investment is very important in Jordan's tourism sector, and is not covered by the DOS enterprise survey. There are two sources of data on foreign investment. For 2004 and 2005, DOS, in collaboration with the Central Bank and the Jordan Investment Board (JIB) conducted a special survey of foreign direct investment, which includes disaggregation that lets them estimate investment in the tourism sector. These data are the basis for Central Bank estimates of FDI in foreign years.

Data on foreign investments that are made in collaboration with JIB are available from the board. Firms that work through JIB receive a variety of tax benefits and practical assistance in launching their projects, so it is unlikely that any large projects would not be carried out through JIB, and therefore be captured in their data. JIB data are disaggregated into three activities related to tourism; hotels, entertainment cities (amusement parks), and conference and exhibition centers. All three of these fall into the TSA classification of tourism characteristic industries, but especially for entertainment cities and conference and exhibition centers only a modest portion of the product will be consumed by tourists. To allocate these the JIB investment figures to tourism, the coefficients discussed above should be multiplied by the value of investments to avoid inflating the share of tourism in the investments. These figures are not adjusted for depreciation, and therefore should not be taken to represent the overall change in value of tourism capital assets over the year.

C.6   Tourism multipliers

While multipliers are not in themselves indicators, they are important coefficients for tracking the larger impact of tourism on the economy. They capture three different impacts of a change in demand for a product on the economy:

- *Direct impact* – if a tourist spends one additional dinar on a tourism product, this will cause a direct increase in final production to meet the new demand.

- *Indirect impact* – the increase in production in turn will lead to increased demand for inputs to the producing firm, and so on down the supply chain. The sum of these input demands is the indirect impact.

- *Induced impact* – the increases in final production and inputs will lead to increased incomes for workers, who will spend this on other products in the economy. These are the induced impacts.

So-called "type I multipliers" are the ratio of direct plus indirect impacts to direct impacts. Type II multipliers are the ratio of direct, indirect, and induced impacts to direct impacts.

These multipliers can be calculated with respect to output, employment, earnings of employees, and value added (VA). Each may be calculated in two ways:

- The output (or employment, earnings, or VA) *multiplier* is the ratio of changes in direct, indirect, and induced (for type II) output to a change in direct output.

- The output (or employment, earnings, or VA) *effect* is the change in direct, indirect, and induced (for type II) output in response to a one unit (dinar, dollar, etc) change in demand.

Multipliers are calculated through the construction of industry x industry input-output tables. These tables, based on the data in the national income accounts, show the impact of a change in demand for one sector's production on the production of all the other sectors in the economy. This can be calculated from data about what each sector produces, which products it uses as inputs, and which sectors manufacture those products.

DOS is working on the construction of Jordan's first input-output tables. The tables include tourism businesses at the two-digit ISIC code, which means that hotels and restaurants are combined within a single industry. The different modes of transport will be separated. Once the I/O tables have been completed, multipliers should be available at the same level of detail as the industry sectors in the table.

C.7   Share of tourism receipts and payments in Balance of Payments aggregates

These national indicators give a quick picture of whether final consumption by tourists is on balance improving or harming Jordan's balance of payments position. It does not shed any light on the role of imports in intermediate consumption of tourism characteristic industries.

These values can be calculated easily from publicly available Central Bank Balance of Payments data, and can be updated annually. For 2000 through 2008, these indicators are shown in the table below.

Share of Travel in Jordan's Balance of Payments Receipts and Payments, 2000-2008									
	2000	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
Total Receipts	**1,162.5**	**1,054.6**	**1,257.9**	**1,239.5**	**1,469.6**	**1,654.5**	**2,061.4**	**2,432.4**	**3,134.1**
Travel receipts	**512.4**	**496.1**	**743.3**	**752.6**	**942.8**	**1,021.4**	**1,460.8**	**1,638.3**	**2,088.5**
Share of travel	**44%**	**47%**	**59%**	**61%**	**64%**	**62%**	**71%**	**67%**	**67%**
Total Payments	**1,220.9**	**1,223.6**	**1,335.0**	**1,339.5**	**1,521.4**	**1,802.3**	**2,106.2**	**2,480.7**	**2,928.6**
Travel pmts.	**247.9**	**267.7**	**321.3**	**320.4**	**371.4**	**414.9**	**593.4**	**625.8**	**712.3**
Share of travel	**20%**	**22%**	**24%**	**24%**	**24%**	**23%**	**28%**	**25%**	**24%**
Source: Central Bank of Jordan. From http://www.cbj.gov.jo/pages.php?menu_id=11, follow links to external sector, services portion of the Balance of Payments (Table 32).									

D.   CAPACITY USE INDICATORS

One of the issues receiving considerable attention in the Jordanian tourism sector is capacity use in hotels. The visitor data provided by the hotels to MOTA are combined to calculate occupancy rates in terms of both room-nights and bed-nights. MOTA publishes these by location, by month, and by classification of hotel or other place of accommodation.

There is a lot of unused capacity in Jordan's hotels; according to the MOTA reports, in 2008 the overall hotel occupancy rate was 46.4%. With the efforts being made to increase the number of tourists coming to Jordan, this figure can be expected to drop; this is certainly the hope of the hotel industry. However, tourists depend on other services for which there may not be as much excess capacity. As the industry tracks hotel capacity utilization, therefore, it is important to also track capacity use for other key services, to ensure that a growth in the number of tourist overnights does not create bottlenecks in access to other services. This will call for the development of several new indicators to supplement those already available on hotel occupancy.

D.1   Hotel capacity and occupancy

These data are already available, and indicators can be found on the MOTA website. They include, for each class of hotels in each location, the number of rooms and beds, and room-nights and bed-nights by month. Occupancy rates can be calculated by moth, to observe seasonal variation, by place, to observe regional patterns, or by class of hotel, to observe visitor preferences in luxury vs. price. As discussed above in the section on visitor overnights, there are some discrepancies in these data, which must be resolved. This should not be difficult, however; on the whole the occupancy rate data are strong.

D.2   Charter Buses

Access to charter buses is already a constraint on tourism in some parts of Jordan during peak seasons. In some cases, tour operators cannot find buses of sufficient quality, and have to resort to renting ones that they consider inadequate for their tours. In other cases, notably with respect to day trips to Petra and Wadi Rum from cruise boats docked in Aqaba, trips have simply been cancelled for lack of buses. Sometimes when one bus company is facing excess demand in the short run, they will rent a bus from another company so that they can in fact rent out more buses than they own. At other times, however, they may rent a bus from a local bus company; those buses are not supposed to be used for tourists, and are of lower quality. An indicator is clearly needed to track bus capacity use systematically, so that the problem can be identified and resolved.

At present, bus companies provide MOTA with annual data indicating how many buses they have in each size class, and the number of seats in buses of each size class. Each month the bus companies submit a report to MOTA with one form for each tour operator with whom they do business, indicating the number of people who traveled in their buses from that operator. The tour operators report to MOTA on numbers of tourists by nationality, but do not indicate whether several nationalities travel in the same bus. The combination of these data, therefore, is not sufficient to track bus use rates and produce a useful capacity utilization indicator.

MOTA staff indicated that they can negotiate with the bus companies to modify their reporting so as to have enough data to construct such an indicator. The bus companies might be asked to report on each contract with a tour operator, providing for each the size of the bus rented, the start and end dates, the start and end locations, and the number of passengers in the bus. If the bus company was short on rolling stock and had to rent a bus from another company, that information would also be included. With these data, it would be possible to quantify the equivalent of room occupancy rates and bed occupancy rates; in this case it would be bus use rates and bus seat use rates. By including start and end date for the contracts, it would also be possible to identify peak load issues within a month; for example, whether demand is much higher on weekends or weekdays, or by how much demand increases at holiday periods. The inclusion of start and end locations would also show the extent to which the constraints are regional. Since buses can be moved, if a company consistently had excess demand in one place and excess capacity in another, they would presumably relocate some of their bus stock in response; nevertheless, these data would be interesting. By identifying the cases when one company had to pull in a bus from another company, it would be even more clear where and when the capacity constraints arise.

D.3   Rental Cars

At present rental car agencies do not have to register with MOTA, but a new system is being introduced through which they will. Since cars are rented by those traveling independently rather than those on package tours, the industry representatives are less aware of whether they present a bottleneck. Once the MOTA permitting system is in place, however, it may be useful to require reporting from the car rental agencies that will show whether this is an issue. By collecting data on fleet size, number of rental contracts per month, and number of rental-days per month, it should be fairly easy to construct a simple indicator to identify bottlenecks in this area. If it appears to be a concern, requesting more detailed information along the lines of the recommended bus information may be useful to determine precisely when and where the constraints arise.

D.4   Visits to key tourist destinations

MOTA tracks the number of Jordanian and foreign visitors to the antiquities sites that it manages, and reports these data on its website. Since Jordanians and foreigners pay different entry fees, tracking the two groups is straightforward. One of the tables on the MOTA website includes more detailed nationality information; the source for these data is not clear.

Tracking visits to key sites over time and through seasonal variation gives a simple picture of the growth of cultural tourism in the country. At present this has not been linked to limits on carrying capacity; however this is under discussion in the case of heavily visited sites like Petra and Wadi Rum. If visitor limits are established, then the ticket sale data will become a key piece of operational information for site management as well as a source of information about seasonal and annual visitation trends.

E. PUBLIC SECTOR FUNDING AND SERVICES

E.1 Public expenditure

This is government expenditure on tourism, and is included in Table 9 of the TSA. The detailed line items include:

Tourism promotion services
Visitor information services
Market research and public opinion polling services
Administrative services related to the distributive and catering trade, hotels and restaurants
Administrative services related to tourism affairs
Police and fire protection services
Other education and training
Educational support services
Other

The detail may differ somewhat in Jordan; for example, it will include the cost of managing antiquities and national parks. It should also include donor funding to the tourist industry from USAID, the EU, and other international donors.

These data come from the public sector operating and capital budgets, including activities funded by donor projects. For MOTA and JTB, these data are easy to identify, since this category includes their entire budgets. For other government agencies, however, and for regional authorities with cross-cutting responsibilities such as ASEZA, it is more difficult to disaggregate the portion of their activities and budgets that pertains to tourism. Compiling these data is done by going over the activities and budgets of each agency to determine which portion should be allocated to tourism.

For many countries building a TSA, this table is considered to be relatively unimportant, and often it is not completed. For Jordan, knowing public expenditure may be important if tourism officials are interested in making a case that public support for their work needs to be higher. In this case they may be particularly interested in relating the public support for tourism with the tax revenues attributable to the sector (discussed below) and the contribution of tourism to GDP.

Once the different budget elements related to tourism have been identified, it should be fairly straightforward to update these data each year.

E.2 Government Revenue from Tourism

The fiscal impact of tourism is positive as well as negative; identifying its contribution to government revenue is an appropriate counterpart to public consumption. This value may help justify government funding for MOTA, JTB, and other agencies based on their contributions to public revenue.

The public sector earns tourism revenue from a number of sources:

Revenue associated with inbound tourism:

- Taxes less subsidies on tourism characteristic industries. This value is collected in the DOS survey of commercial enterprises, and should be aggregated in the TSA. As with other TSA calculations, the tourism coefficients discussed above must be applied to this line item for each tourism characteristic or connected industry to determine how much public revenue should actually be allocated to tourism.
- Revenue from visa sales
- Sales and hotel taxes paid by tourists. It should be possible to estimate this from tax rate information and the NTVS and DTVS data on expenditure.
- Customs duties (if any) paid by overseas Jordanians bringing in goods to give to family and friends in Jordan

Revenue associated with outbound tourism:

- Airline tax revenue should be available from Royal Jordanian and estimated for tourists arriving on other airlines.
- Customs duties on goods brought from abroad by Jordanians traveling outside the country for tourism.

These figures have apparently not been calculated yet. Once the precise data sources (and possibly other items for inclusion) have been identified, it should be straightforward to update them annually.

E.3   Expenditures on tourism marketing

Expenditures on tourism marketing are of two broad types, those designed to encourage tourists (inbound or domestic) to visit the country, and those designed to encourage investment (primarily foreign) in the tourism sector. These figures are a subset of the overall tourism expenditure figures discussed above. In the public sector, they include the expenditures by JTB, JIB, MOTA and ASEZA, as well perhaps as other agencies. In the private sector they include the expenditures of individual tourism businesses and their trade associations.

For the tourism marketing organizations, the relationship between these expenditures and total growth of tourism (visits, expenditures, or investment) give an understanding of the effectiveness of marketing strategies. At an operational level, they can also be used to analyze specific marketing strategies and decide which pay off best. At the operational level, they may involve special detailed data collection. The visitor survey now being carried out by JTB is such an effort. It narrowly targets visitors from countries where JTB has made or is considering making a significant marketing effort, to enable the Board to assess the effectiveness of its own activities on visitors. JIB's analysis of its own strategies, leading to a decision to target specific countries and specific potential investors within those countries, is another such example.

E.4   Use of tourism-related websites

The public agencies serving the tourist industry have built websites to provide information about the industry and the agencies' activities. The trend in number of hits on those sites, and the number of new and return users, can provide useful information about the extent to which the sites are reaching an audience. In addition to the overall indicator of number of hits, the services that collect such data can also allow the site owner to trace where in the world and where on the internet each hit comes from and a wide range of other detailed statistics. This may be of interest for the sites of MOTA, JTB, JIB, ASEZA, and the DOS tourism statistics.

F. MEASURING TOURISM SATISFACTION AND PRODUCT QUALITY

F.1 Surveying visitor satisfaction

Evaluating tourism satisfaction is important at many levels. At the macro level, the country would like to track its performance over time, and trends in broad measures of visitor satisfaction can help do this. For strategy purposes, information on visitor satisfaction will be valuable in setting priorities both for improving the tourism product and for marketing. At the operational level, the managers of hotels, tour companies, tourist sites, and others in the industry want feedback on the quality of their products. Broad indicators of visitor satisfaction can help address some of these needs; others, particularly those of individual business managers, will have to be met through surveys conducted by the operators themselves, since their data needs will be too specific to be met by national indicators.

NTVS visitor satisfaction questions: The 2006-7 NTVS asked three satisfaction questions, to which the responses are not helpful. The table below shows the questions and the shares of responses by all non-Jordanians (including all purposes of travel). (Responses by Jordanians returning home are similar, but since they will probably return irrespective of the quality of the experience, their answers are perhaps less important.)

503	**How would you describe your overall reaction to this trip?**	
	1. It was thoroughly enjoyable 82%	3. It was somewhat disappointing 3%
	2. It was enjoyable but not outstanding 15%	4. It was very disappointing 0%
504	**Would you like to come again to Jordan?**	
	1. Yes 94% 2. no 1% 3. undecided 5%	
505	**Would you recommend Jordan as a holiday destination to your friends, relatives or others?**	
	1. Yes 94% 2. no 1% 3. do not know 5%	

While the Jordanian travel industry may be happy about the overwhelmingly positive responses, clearly 94% of non-Jordanian visitors are not going to come back again. And while on the whole visitors probably did enjoy their trips, a more useful question might be to ask them how this one compared with other trips they have taken. Uniformly positively responses are not useful for determining what Jordan can do better.

JTB 2009-10 marketing survey: A second source of information will provide better data on this issue. JTS is in the process of carrying out an inbound visitor survey to provide information that will inform their marketing efforts. It greatly improves on the 2006-7 survey with respect to ratings questions, including the questions below:[9]

26.   Did your stay fulfil your expectations? (**Show card**)

> 1. Yes   2. Partly   3.No   4.No answer

27.   How likely is it that you will return to Jordan for a holiday visit during the next three years?   (**Show card**)

---

[9] The full survey is in Annex J.

1. Very likely   2.Likely 3.Unlikely   4.Very unlikely

28.   Please give reasons for your answer:
……………………………………………………………………………………………
……………………………………………………………………………………………
Record verbatim

29.   Would you recommend Jordan to your friends and relatives for a holiday visit?   (**Show card**)
        1. Definitely   2.Perhaps   3.Not sure   4.No   5.Never

30.   What   is   your   best   memory   or   experience   of   Jordan?
……………………………………………………………………………………………
……………………………………………………………………………………………

Record verbatim

31.   What is your most unpleasant experience of Jordan? (If any)
……………………………………………………………………………………………
……………………………………………………………………………………………
Record verbatim

32.   Please give suggestions or comments as to how we can improve tourism in Jordan?
……………………………………………………………………………………………
……………………………………………………………………………………………
Record verbatim

33.   Were there any activities which you expected to find in Jordan which were missing?

1	Yes
2	No

33a   **If   yes**,   please   list   them
……………………………………………………………………………………………
……………………………………………………………………………………………

34.   If you **had to buy** items/ Souvenirs from Jordan, what will that be?[10]
        (**Show Card**)

1. Mosaic
2. Embroidery
3. Carpet
4. Dead Sea Products
5. Other (Specify): **…………………**

35.   Please respond to the following questions with the appropriate answer:
        (**Show card**)

        1- Strongly agree   2- agree
        3- Neutral   4- disagree
        5- Strongly disagree   0- not available (**Do not read out**)

---

[10] The curious wording of this question is unintentional and probably due to slight lack of English proficiency. It actually asks which single handicraft item the respondent liked best. The respondent is not shown this list of possible responses; in fact, the surveyors are collecting data about a much longer list of items, and coding all of them.

35-a   Good souvenirs and crafts were available

1	2	3	4	5	0

35-b   The quality of Food and Beverages were good

1	2	3	4	5	0

35-c   The quality of accommodation was good

1	2	3	4	5	0

35-d   The level of service provided was high... including (rest rooms/ visitor centre)

1	2	3	4	5	0

35-e   I felt safe and secure during my visit

1	2	3	4	5	0

35-f   I felt I received good value for money

1	2	3	4	5	0

The responses to this survey will be interesting in themselves, and will be valuable as an input into the design of the next NTVS. The open ended questions are eliciting a list of fairly standard responses, which are being used to code the data into a form that can be analyzed statistically. In discussions at JTB, the statisticians indicated that the biggest negatives reported by respondents so far pertain to cleanliness of roads and of bathrooms at tourism sites. Addressing the second complaint should be fairly straightforward; responding to the first will be more difficult.

To the extent that this survey elicits clear and useful responses, the same questions should be included in the next NTVS. This will allow us to see if there is any change over time in the responses, which may indicate that the appropriate Jordanian authorities have actually learned from the information in this year's survey.

The question about whether visitors are likely to come back to Jordan on vacation in the next three years is more likely to elicit a sensible response than the 2006-7 NTVS question on the same subject – "would you like to come again?" Perhaps an even better way to frame this question might be "where do you expect to go on your next vacation?" with "return to Jordan" one of a series of choices.

WTO survey: WTO has developed a number of sample inbound tourism surveys that include a number of questions through which tourists could rate their experiences in the country. The first set pertains to the immigration experience, the airport, and the airline on which the visitor arrived. They are directly useful for management purposes, since they evaluate the services offered by clearly identifiable participants in the market. They are too detailed for inclusion in the next NTVS, however.

The second set of questions, shown in the table below, asks the visitor to rate the country. These may be useful to the tourism industry in deciding how it can better tailor the country's product to its market. Several considerations may be important in evaluating these questions:

- For a given response to be usable, is it necessary to link it to the activities of the respondent? For example, if the visitor is asked to rank transport in the country, it will be important to know how that visitor traveled around the country. If such a link is necessary, it is important to ensure that the survey makes it possible.

- Opinions on the quality of hotels and other tourist facilities may be of much greater interest to the management of the individual facilities than in a national survey. Similarly, questions about the conditions at tourist sites could more useful if collected at the sites rather than in a national survey. In general, in designing the next visitor survey and in completing the tourism strategy that is now in process, it is important to think about which information must be collected by whom in order for it to be used as desired.

- Several of these questions don't seem likely to elicit useful information. The "overall opinion" rating of the country provide actionable responses. The same may go for an assessment of "cities and works." The question on languages might be made narrower, specifying that it pertains to knowledge of languages on the part of those working in tourist businesses. The question on friendliness and courtesy might be modified in the same way.

Ratings of the country						
	A. Excellent	B. Good	C. Average	D. Fair	E. Poor	F. Don't Know
1. Overall opinion	☐ 51	☐ 52	☐ 53	☐ 54	☐ 55	☐ 56
2. Tourist services and information	☐ 61	☐ 62	☐ 63	☐ 64	☐ 65	☐ 66
3. People friendliness / courtesy	☐ 71	☐ 72	☐ 73	☐ 74	☐ 75	☐ 76
4. People's knowledge of languages	☐ 81	☐ 82	☐ 83	☐ 84	☐ 85	☐ 86
5. Cities and works	☐ 91	☐ 92	☐ 93	☐ 94	☐ 95	☐ 96
6. Transport	☐ 01	☐ 02	☐ 03	☐ 04	☐ 05	☐ 06
7. Value of money / Prices and cost of living	☐ 11	☐ 12	☐ 13	☐ 14	☐ 15	☐ 16
8. Hotels and other available accommodation	☐ 21	☐ 22	☐ 23	☐ 24	☐ 25	☐ 26
9. Variety of things to see and do / Activities	☐ 31	☐ 32	☐ 33	☐ 34	☐ 35	☐ 36
10. Service (standard)	☐ 41	☐ 42	☐ 43	☐ 44	☐ 45	☐ 46
11. Quality and choice of goods	☐ 51	☐ 52	☐ 53	☐ 54	☐ 55	☐ 56
12. Food, cuisne, restaurants	☐ 61	☐ 62	☐ 63	☐ 64	☐ 65	☐ 66
13. State of environment	☐ 71	☐ 72	☐ 73	☐ 74	☐ 75	☐ 76
14. Safety of tourists	☐ 81	☐ 82	☐ 83	☐ 84	☐ 85	☐ 86

The final set of questions, shown in the table below, pertains to whether the respondent is likely to come back to the country. Given Jordan's size, this issue can probably be reduced to a single question, along the lines of the variants discussed above.

Other ratings questions			

(101)	(102)	(103)	(104)
DO YOU INTEND TO COME BACK TO OUR COUNTRY?	DO YOU INTEND TO GO BACK TO THE SAME REGIONS?	DO YOU INTEND TO GO TO ONE OR MORE OTHER REGIONS?	DO YOU CONSIDER RECOMMENDING THIS DESTINATION TO OTHERS?
A. No....... ☐ 6 —(104)	A. No....... ☐ 7	A. No....... ☐ 8	A. No....... ☐ 9
B. Yes...... ☐ 1 —(102)	B. Yes...... ☐ 2	B. Yes...... ☐ 3	B. Yes...... ☐ 4

(105)

IF YOU HAD NOT COME HERE, WHAT OTHER DESTINATION WOULD YOU HAVE TRAVELLED TO?

A. None.. ☐ 01

B. Another destination in our country...................... ☐ 02

C. Another destination outside our country........... ☐ 03

D. Don´t know.. ☐ 04

Another issue of interest to many in the tourism industry is to find out what kinds of activities tourists want, so that the industry can begin providing things not now offered. Instead of asking how satisfied visitors were with the range of activities, it might be interesting to offer a question something like this:

For each of the activities listed below, please check the column that corresponds to your experience			
	Did this	Would have done this if I'd had time	Would have done this if it had been available	Not interested
Visiting ancient sites				
Hiking in the desert				
Horseback trip in the desert				
etc.				

Some of the activities on the list will actually be available, while others are not. For activities that are in fact an option, this could shed light on how well-informed visitors are about what

Jordan offers. For those that are not an option, it could indicate whether offering them could be profitable.

F.2   World Economic Forum Competitiveness Index

The World Economic Forum index of travel and tourism competitiveness is a ranking of countries according to 73 criteria that measure how attractive the country is to foreigners choosing places in which to invest in tourism. The index has been calculated twice, in 2007 and 2009, and presumably will be updated on a regular basis. Some of the 73 criteria are calculated from actual measurements about aspects of the country concerned, while others reflect the subjective assessments of a group of business leaders who completed the "Executive Opinion Survey." Jordan ranked 54th out of 133 countries in the 2009 index.

The WEF rankings, both for the overall index and for the underlying "pillars," are interesting and certainly should be tracked by the Jordanian tourism sector. However it would be hard to use the ranking as a domestic indicator, for a number of reasons. The overall index is made of up of so many underlying indicators that no one of them will have much impact on Jordan's ranking. Moreover, this is essentially a competition – Jordan's score is not important, what matters is whether it scores better than its competition as a tourism destination or as a investment target. While Jordan can work to improve its absolute score, it cannot do anything about the scores of other countries.

Most of the underlying indicators, while perhaps having an influence on tourism competitiveness, are too far removed from the tourism industry to be used for the tourism strategy. Measures on issues such as health care, education levels, or environmental policy cannot be influenced by actors in the tourism industry; even if they affect tourism investment or arrivals, it is indirectly.

A few indicators, while outside of the control of the tourism sector, may nevertheless have enough influence on investment or arrivals to be worth tracking:

> 1.07 Time required to start a business
> 1.08 Cost to start a business
> 3.01 Business costs of terrorism
> 10.02 Purchasing power parity
> 10.05 Hotel price index

The first two measures could serve as a deterrent to investments in tourism, both foreign and domestic. The last three could deter both investors and tourists. All of them could influence the effectiveness of tourism marketing efforts, so it is important to be aware of them even if it is impossible to control them.

G. SURVEY QUESTIONNAIRE FOR INTERNATIONAL VISITORS TO JORDAN

Arrivals and Departures Survey 2006/2007
Departures

101	Serial No	
102	**Respondent Sample No**	
103	**Systematic Period**	
104	**Point of entry**	
105	**Point of exit**	
106	**Date of arrival**	……/……./ 200
107	**Date of departure**	……/……./ 200
201	**Nationality**	
202	**Place of usual residence………………………….** (last country of residence or intended for residence for twelve months or more excluding , non Jordanian people traveling for medical treatment , non Jordanian students, non Jordanian Diplomats and non Jordanian Military personnel irrespective of their residence period)	
203	**Do you reside in Jordan?** 1. No - proceed with interview 2. Yes - end interview (unless, people traveling for medical treatment non Jordanian student, non Jordanian Diplomat and non Jordanian Military Personnel)	
204	**What was the main purpose of your visit to Jordan?** a) International Visitor (proceed)	
	1. Vacation 2. Visiting friends/ relatives 3. Business 4. Conference / seminar 5. Medical 6. Study	7. Religious visit 8. Crew members 9. Diplomat 10. Military personnel 11. Transit (at the Airport) 12. Transit 13. Other (specify)
	b) Other type of traveler (end interview here) 1. Owns a business in Jordan 2. Immigrant	3. Border crossing worker 4. Other (specify)
301	**How many times have you visited Jordan in the past 5 years)?** (including this visit)	
	1. First time 2. Second time	3. Third time 4. More than 4 times
302	**Are you traveling on a package tour?** 1. yes	2. no
303	**Who are you traveling with?** 1. Alone 2. With spouse or partner	3. With spouse and children 4. With children
304	**Which type of transport did you travel in? (at departure)** 1. Air 2. Sea 3. Bus	
305	**If traveling by air, which air-carrier did you fly on?**	
306	**If traveling by other transport means, was it Jordanian?**	
	1. When Arriving 1. Yes 2. No 2. When Departing 1.Yes 2. No	
307	**Which was the most attracted site you have visited during your stay in Jordan?**	

	1. Petra 2. Aqaba 3. Jerash 4. Madaba 5. Ajlun 6. Wadi Rum	7. Al Karak 8. Mount Nebo 9. Dead Sea 10. Bethany Baptism Site 11. Other (specify)………. 12. Have not visited any site
401	How many nights did you spend in Jordan?	
402	**Which type of accommodation did you <u>mostly</u> stay at when in Jordan?**	
	1. Hotel 2. Suite or apartment hotel 3. Private apartment 4. Stayed with friends or relatives	5. Own house or apartment 6. Means of transport 7. Other (specify)……. 8. Have not stayed for an overnight
403	**Who made arrangements for the main trip?**	
	1. Travel agency or tour operator (continue) 2. Own arrangement 3. Employer Go to 406 4. Conference organizer 5. Association	

404	**Amount paid in your country**		
JD	$US	Euro	Other

405	**What does the amount paid in your country include?**	
A. Tickets 1. one way 2. two way		
B. Accommodation		
1. full board 2. Half board	3. Bed and Breakfast 4. Only Bed	

406	**What was your estimated expenditure in Jordan on this trip abroad including local transport?**		
Total amount in currency			
JD	US $	Euro	Other

407	**In which areas did you spend your money?** **(Please specify the amount of expenditure on each of the following)**		
Expenditure	**Amount**	**%**	
1. Jordanian international transport			
2. Non Jordanian international transport			
3. Accommodation			
4. Food & Beverages			
5. Entertainment			
6. Medical treatment			
7. Study			
8. Local transport			
9. Shopping			
10. Other			
Total			

408	**How many persons were included in the above expenditure?**	
409	**What was the main source of funds for your trip?**	
	1. Self 2. Employer	3. Government 4. Other (specify)
501	**Does the program of this tour include visiting other countries except Jordan ?**	
	1. yes 2. no	
502	**What is the <u>main factor</u> that influenced you to choose Jordan as a destination on this trip?**	
	1. Travel agent	5. Web sites on Jordan

	2. Promotion by airline 3. Advertisement on TV 4. Advertisement by Magazine or newspapers	6. Recommendation by friends/relatives 7. Other (specify)
503	**How would you describe your overall reaction to this trip?**	
	1. It was thoroughly enjoyable 2. It was enjoyable but not outstanding	3. It was somewhat disappointing 4. It was very disappointing
504	**Would you like to come again to Jordan?** 1. Yes 2. No 3. undecided	
505	**Would you recommend Jordan as a holiday destination to your friends, relatives or others?** 1. Yes 2. No 3. do not know	
601	**Which gender are you?**	1. Male 2. Female
602	**What is your age? (in full years)**	
603	**What is your occupation?**	

Activity	Date	Official's Name
Survey Conducted	……../……../ 200	
Field Control	……../……../ 200	
Instrument Control	……../……../ 200	
Data Input	……../……../ 200	
Data Verification	……../……../ 200	

H. SURVEY QUESTIONNAIRE FOR JORDANIANS RETURNING FROM TRAVEL ABROAD

Arrivals and Departures Survey 2006/2007
Arrivals

	1. Arrivals Data		
101	**Serial No**		
102	**Respondent Sample No**		
103	**Systematic Period**		
104	**Point of entry**		
105	**Date of departure**	……/……./ 200	
106	**Date of arrival**	……/……./ 200	
	2. Nationality & Residence		
201	**Nationality**		
202	**Place of usual residence: . . . .** (last country of residence or intended for residence for twelve months or more excluding Jordanian people traveling for medical treatment and Jordanian students, Jordanian Diplomats and Jordanian Military Personnel irrespective of their residence period)		
203	**Do you reside in Jordan?**		
	Yes - proceed with interview No - end interview here (unless people traveling for medical treatment, Jordanian students, Jordanian Diplomats and Jordanian Military Personnel)		
204	**What was the main purpose of your visit abroad?**		
	a) International Visitor (proceed with interview)		
	1. Vacation or Leisure 2. Visiting friends or relatives 3. Business tour 4. Conference or seminar 5. Medical Treatment 6. Study	7. Religious or pilgrimage 8. Crew members 9. Diplomat 10. Military personnel 11. Other (specify)	
	b) Other type of traveler (end interview here)		
	1 Owns a business abroad 2. Immigrant	3. Border crossing worker 4. Other (specify)	
	3. Travel Patterns		
301	**What was your main destination?**		
302	**Are you traveling on a package tour?** 1. yes 2. no		
303	**Which type of transport did you travel in? (at arrival)**		
	1. Air 2. Sea 3. Bus 4. Car 5. Other (specify)		
304	**If traveling by air, which air-carrier did you fly on?** (Please specify name):		
	1. Carrier when departing 2. Carrier when arriving		
305	**If traveling by other transport means, was it Jordanian?**		
	1. When Departing 1. Yes 2. No 2. When Arriving 1. Yes 2. No		

4. Expenditure Patterns			
401	**How many nights did you spend outside Jordan?**		
402	**Who made arrangements for the main trip?**		
	1. Travel agency or tour operator (continue) 2. Own arrangements 3. Employer 4. Conference organizer } Go to 405 5. Association		
403	**Amount paid in Jordan, in currency:**		
	JD	US$	Euro
404	**What does the amount paid in Jordan include?**		
	A. Tickets 1. one way 2. two way		
	B. Accommodation		
	1. full board 2. Half board	3. Bed and Breakfast. 4. Only Bed	
405	**What was your estimated expenditure on this trip abroad including transport?** Total amount in currency:		
	JD	US $	Euro	Other
406	**In which areas did you spend your money?** **(Please specify the amount of expenditure on each of the following)**		

Expenditure	Amount	%
1. Jordanian international transport		
2. Non Jordanian international transport		
3. Accommodation		
4. Food & beverages		
5. Entertainment		
6. Medical treatment		
7. Study		
8. Shopping		
9. Other (specify)		
Total		

407	**How many persons were included in the above expenditure?**		
408	**What was the main source of funds for your trip?**		
	1. Self 2. Employer	3. Government 4. Other (specify)	

5. Respondent Data		
501	**Which gender are you?**	
	1. Male	2. Female
502	**What is your age?** (**in full years)**	
503	**What is your occupation?**	

Official Use Only

Activity	Date	Official's Name	Signature
Survey Conducted			
Field Control			
Instrument Control			
Data Input			
Data Verification			

I. DOMESTIC TOURISM EXPENDITURE SURVEY

Serial. No. of cluster |__|__|__|__|

Part one: Identification

101	Governorate	|__|__|	**110**	Serial No. of Household in the cluster	|__|
102	District	|__|__|	**111**	No. of Building in the Block	....
103	Sub district	|__|	**112**	No. of dwelling in the Building	....
104	Locality	|__|__|__|	**113**	Cycle NO.	|__|__|__|
105	Urban/ rural	|__|	**114**	Name of head of house hold	....
106	Area	|__|__|	**115**	Address	....
107	Neighborhood	|__|__|		Tel.	....
108	Block NO.	|__|__|__|	**116**	Strata No.	|__|
109	Cluster No.	|__|__|__|__|__|	**117**	Ser. No. of Questionnaire	|__|__|__|__|__|__|

118	Did the Family or one of the members under take a Domestic Tour during the last quarter? **1. Yes (cont.)** **2. No (Go to question 304)** |__|
119	No. of domestic tours that were under taken by the family or one of the members |__|

Part 2. Travel and Expenditure Details

Note: The original questionnaire was set up in a spreadsheet, with one row to be filled out for each trip taken over the year by any member of the household surveyed. For reasons of formatting, the presentation has been modified in this document.

201. Serial of No. tour (identifier for each trip of a given household)

202. Number of member who traveled?

203. Main purpose of visit
         1. Vacation and Leisure
         2. Visiting Friends and Relatives
         3. Business Tour
         4. Seminar, Training Course
         5. Conference
         6. Shopping Tour
         7. Treatment Tour (medical care)
         8. Religious Visit
         9 .School, University Tour
         10. Other ……

204. The Main Destination

205. Covered Distance (km) "for going" (distance traveled one way)

206. Means of Transport
         1. Private Car
         2. Public Vehicles
         3. Rent Car
         4. Plane
         5. Other ……

207. No. of nights. If one day tour go to Q. 209.

208. Type of Accommodation During the Tour
         1. Hotel
         2. Suite and Apartment Hotel
         3. Private Apartment
         4. Stayed with Relatives or Friends
         5. Own House or *[sic]*
         6. Camp
         7. Other

209. Was it full package tour?
         1. Yes (cont.)
         2. No (Go to Q 211)

210. Amount paid for the package tour? (*Note: this is the total cost for the group traveling, not the per capita cost*)

211. Total cost of the tour? (This is the calculated sum of the items in question 212.)

212. Items of expenditure in JD'S (*note: these are expenses for the group traveling, not expenses per person)*
        212.1 Accommodation
        212.2 Restaurants and cafés
        212.3 Transport
        212.4 Shopping
                4.1 Related
                4.2 Routine
        212.5 Entertainment
                5.1 Sports
                5.2 Cultural
        212.6 Medical expenses
        212.7 Other

301. What were the activities done?
        1. Water sports
        2. Museums
        3. Historical monuments
        4. Camping
        5. Festivals
        6. Others
        7. None

302. What was your source of information of the trip?
        1. T.V. advertisements brochures
        2. Movies
        3. Own knowledge
        4. From friends
        5. Book & magazines
        6. Information provided by hotels
        7. Others

303.1 The Roads and Means of Transport
        1. Excellent
        2. Good
        3. Fair
        4. Poor
        5. Very Poor

303.2 Tourist Facilities
        1. Excellent
        2. Good
        3. Fair
        4. Poor
        5. Very Poor

303.3 Services at Tourist Sites
        1. Excellent
        2. Good
        3. Fair
        4. Poor
        5. Very Poor

J. JTB 2009-10 EXIT SURVEY

Jordan Tourism Board

INTERNATIONAL VISITOR EXIT SURVEY
2009
Dear Visitor;

We ask for your cooperation in participating in this survey conducted by the **Jordan Tourism Board** for statistical purposes. The results of the survey will help us better understand the needs of all tourists visiting Jordan and improve the tourist services and infrastructure offered.

For Official Use:

Name of interviewer   _____

Date of the interview: _____ / _____ / **2009**
                                              Day   /   Month

Flight Number   _____

Interviewer: Only visitors who permanently reside outside of Jordan and have spent at least one night and not longer than 12 months (1 year) in Jordan are eligible for this survey.

Part One: Introductory Questions:

1a What is your country of residence? _____

1b What is the city of residence within the country? _____

If Jordan thank and close interview; if any other country among the list you have continue.

2a When did you arrive in Jordan?   _____ / _____ / _____
                                                        Day / Month / Year

2b How many nights did you stay in Jordan? …………….. Nights

If arrived on date of interview, or more than one year before date of interview, thank and close; others continue.

Personal and Visitor Profile Questions

3.   Gender   1.Male   2.Female

4.   **What is your nationality?**   _____

5.   What is your occupation?   _____

6.   To which of the following age groups do you belong? **Show card:**

If less than 16 do not recruit

1. 16 – 24   2. 25 – 34   3. 35 – 44
4. 45 – 54   5. 55 – 64   6. 65 and above

7. What was your main **purpose** for visiting Jordan? **Do not read (ONE ANSWER ONLY)**

1	**Vacation / Leisure/ Holiday**	5	Conference/Incentive
2	Visiting Friends/Relatives	6	Study
3	Religion/ Pilgrimage	7	Medical Treatment
4	Business/ Official	8	Other Purpose (Specify) *…………………*

8. How many times have you visited Jordan before?

1	Once	
2	Twice	**Ask Q 8a**
3	Three times or more	
4	**First time in Jordan**	**Go to Q 9**

8a. Have you visited Jordan before for **Vacation / Leisure/ Holiday**?

Yes	1
No	2

9. What was your **main** source of information on Jordan on this **current trip**? **Do not read (ONE ANSWER ONLY)**

1	Recommendation of Travel agent/Tour operator	6	Recommendation by Friends/Relatives (word of mouth)
2	Advertisement on TV/ Radio	7	Advertisement on Newspapers, Magazines
3	Business/Government sources	8	Previous visits
4	Travel guidebooks/Brochures	9	Promotion by airline
5	Web sites on Jordan	10	Other sources (specify) **……………**

9a. which of the following channels you used in booking this trip? **Read**

1	Travel Agent/ tour operator
2	Directly through friends/ relatives in Jordan
3	Online travel agent
4	Directly through the hotel and transportation websites
5	Other (Specify) ………………...

10. Who you are travelling with? **(ONE ANSWER ONLY)**?

1	Alone	**Go to Q 12**
2	With a spouse / partner	
3	With spouse and children	
4	With children	
5	With business colleagues	**Continue**
6	With other relatives	
7	With my friends	
8	Others (specify) **………**	

11. How many of your personal travelling party are adults **(aged 16 years and over)**, **including yourself**? And how many are accompanying children **(under 16 years)**?

   a)   Adults _____

   b)   Children _____

   If "Holiday/Leisure/Vacation" at Q7 continue; others go to Q 13

12. Which other countries did you consider for a holiday before choosing Jordan for this trip?

1- ……………………
2-……………………
3- …………………...

13. Did you take any sightseeing tours while in Jordan (organized by Travel agents, independently or both)?

Yes	1	
No	2	**if NO skip to Q 15**

14. Which sightseeing tours did you take?

…………………………………………………………………………………………
………………………………………………………………………………………

15. Why **did you not** take any organized tours?

…………………………………………………………………………………………
………………………………………………………………………………………

Record verbatim

Part two: Tour arrangements and Expenses

16. Are you travelling on a **Package Tour** or **your own or office arrangement**?
    Interviewer: Package tour includes the fare to/from Jordan **and** land arrangements such as accommodation, transportation, sightseeing tours, car hire, etc

1	Yes – Package Tour	**Continue**
2	No – Own or office arrangement	**Go to Q 21**

17. Apart from the international airfare, what else did the package include? **Read out**

1	Accommodation	5	Food and Beverage
2	Sightseeing Tours	6	Airport transfers
3	Car rental	7	Other services (Specify)**……………………**
4	Domestic air fares		

18. Does the price of the tour include any stays in other countries?

1	Yes	**Continue**
2	No	**Go to Q 21**

19. What countries are included in your current tour in addition to Jordan?

1. Syria	4. Egypt
2. Israel	5. Lebanon
3. Sharm El Sheikh	6. Other (Specify) …**……………**

20a How many nights **IN TOTAL** are covered by the price of the package tour?
------------------ Nights

20b And how many nights **IN JORDAN** are covered by the price of the package tour?
------------------ Nights

21. Where did you stay in Jordan? Please state the type and location of hotels and other accommodation that you have used in Jordan and the number of nights spent in each category

Code	Type of the accommodation	Code	Location of the accommodation	Number of nights

22a How much did you pay for your fare to/from Jordan and your package/inclusive tour, as appropriate **Include joint expenses by yourself/friends/family members, if any?**
     ………………. JD

22b How many persons does this expenditure cover? ⬚ Persons

23a In all, how much did you (and your family members/friend travelling with you, if any) spent **during your stay here in Jordan** (excluding international fares, cost of package or anything else paid for in advance of your arrival in Jordan)?
     ………………. JD

23b How many persons does this expenditure cover? ⬚ Persons

24. Try to give a breakdown of your total expenditure **in Jordan** (as per Q.23a above) to the best of your recollection, according to the following categories: in Jordanian Dinar:

Category		JD
1	Accommodation	
2	Food and Beverages	
3	Medical treatment	
4	Study	
5	Transport in Jordan	
6	Entertainment and Cultural services	
7	Shopping	
8	Other (Specify)**………………..**	
Total		

Interviewer: Check that the total spend at Q.24 matches the spend at Q.23 (a). If the totals are different, ask the respondent which is correct and adjust accordingly.

25. Where will be your next trip stop after leaving Jordan? **(Do Not read out)**

1. Back home	4. Egypt
2. Israel	5. Lebanon
3. Syria	6. Sharm El Sheikh
7. Other (specify) **………………**	

Part Three: The Satisfaction Section

26. Did your stay fulfil your expectations? (**Show card**)

      1. Yes   2. Partly   3.No   4.No answer

27.   How likely is it that you will return to Jordan for a holiday visit during the next three
       years? (**Show card**)

           1. Very likely   2.Likely   3.Unlikely   4.Very unlikely

28.   Please give reasons for your answer:
       …………………………………………………………………………………………………
       …………………………………………………………………………………………

 Record verbatim

29.   Would you recommend Jordan to your friends and relatives for a holiday visit?
       (**Show card**)
         1. Definitely   2.Perhaps   3.Not sure   4.No   5.Never

30.   What   is   your   best   memory   or   experience   of   Jordan?
       …………………………………………………………………………………………………
       …………………………………………………………………………………………………

Record verbatim

31.   What is your most unpleasant experience of Jordan? (If any)
       …………………………………………………………………………………………...……...……
       …………………………………………………………………………………………………

Record verbatim

32.   Please give suggestions or comments as to how we can improve tourism in Jordan?
       …………………………………………………………………………………………………
       …………………………………………………………………………………………………

Record verbatim

36.   Were there any activities which you expected to find in Jordan which were missing?

1	Yes
2	No

33a   **If   yes**,   please   list   them
       …………………………………………………………………………………………………
       …………………………………………………………………………………………………

37.   If you **had to buy** items/ Souvenirs from Jordan, what will that be?
       (Show Card)

1. Mosaic
2. Embroidery
3. Carpet
4. Dead Sea Products
5. Other (Specify): **…………………**

38.   Please respond to the following questions with the appropriate answer:
       (Show card)

1- Strongly agree	2- agree
3- Neutral	4- disagree
5- Strongly disagree	0- not available **(Do not read out)**

35-a   Good souvenirs and crafts were available

1	2	3	4	5	0

35-b   The quality of Food and Beverages were good

1	2	3	4	5	0

35-c   The quality of accommodation was good

1	2	3	4	5	0

35-d   The level of service provided was high... including (rest rooms/ visitor centre)

1	2	3	4	5	0

35-e   I felt safe and secure during my visit

1	2	3	4	5	0

35-f   I felt I received good value for money

1	2	3	4	5	0

K. LIST OF PEOPLE INTERVIEWED

- Bilal Abuzeid — National Tourism Strategy Coordinator
- Amjad Alshatnawi — Senior Marketing Officer, ASEZA
- Lina Annab — General Manager, Zara Investment Holding Co., Ltd
- Bilal Bashir — Deputy Chief Commissioner, ASEZA
- Rashed Darwazeh — Partner, BDO National Brothers, Management Consultants
- Elias Farraj — Advisor to the CEO, Jordan Investment Board
- Siham Ghamouh — Director of Research, JTB
- Farouk Al Hadidi — Secretary General of MOTA
- Mona Hawa — Director of Marketing and Tourism, ASEZA
- Shadi Khawaja — Research Department, Central Bank
- Ahmad Kraishan — Economic Researcher, JTB
- Mohanad Malhas — Managing Director, Abercrombie & Kent
- Ahmad Al-Manha — Tourism Marketing Officer, ASEZA
- Abdelwadoud Matouk — Director of Economic Surveys, DOS
- Maha Mousa — Program Management Specialist, USAID
- Michael Nazzal — Chairman of the Board, Jordan Hotel Association
- Ghada Sharaf — Research Department, Central Bank
- Nasser Sunnaa — Strategic Development Manager, MOTA
- Fayyad Al-Sukkar — Chargé affaires, Information and Statistics Department, MOTA