



MINISTRY OF TOURISM AND ANTIQUITIES

**JORDAN**  
*Kingdom of Time*

# **TOURISM QUARTERLY REVIEW**

## **Q1 2024**



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# 1. INTRODUCTION

This Tourism Quarterly Review summarizes the performance of the tourism sector for 2023 and Q1 2024. It will detail the achievements, analyze the impact of the war on Gaza on the tourism sector, as well as provide scenarios regarding the potential impact for the forthcoming periods. Additionally, this review will include a set of priorities which will form the action plans for 2024 for the Ministry of Tourism and Antiquities (MoTA)<sup>1</sup>.

Furthermore, Quarterly Reviews will be published on the Ministry of Tourism and Antiquities website and disseminated to key stakeholders at the end of each quarter.

Comments/enquiries regarding this document can be sent to Dr. Emad Hijazeen, The Secretary General of MoTA @ [Ehijazeen@mota.gov.jo](mailto:Ehijazeen@mota.gov.jo)

To access the Tourism Statistical Dashboard, please scan the QR-Code below.



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<sup>1</sup> MoTA includes Ministry of Tourism and Antiquities, Jordan Tourism Board and Department of Antiquities

## 2. TOURISM PERFORMANCE SUMMARY - 2023

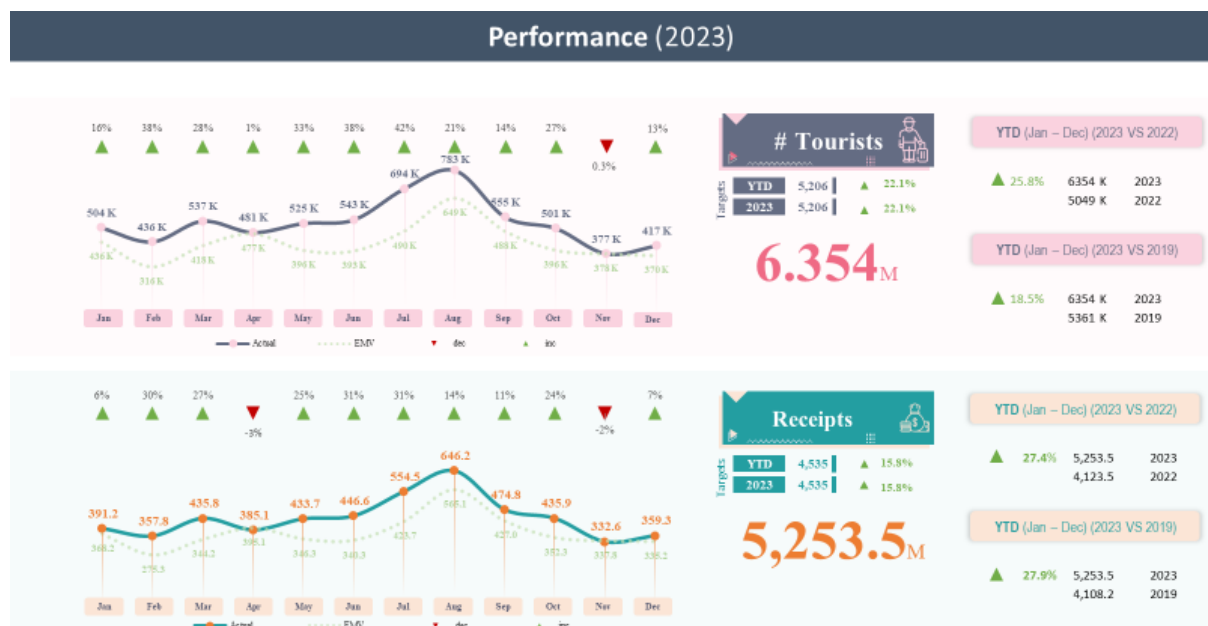
Despite the impact of the war on Gaza especially in Q4 of 2023, the tourism sector in 2023 witnessed record levels in terms of the number of inbound tourists and the receipts (revenues) they generated.

The number of tourists in 2023 reached 6.354 million, an increase of 25.8% Vs. 2022 and 18.5% increase on 2019<sup>2</sup> thus surpassing MoTA’s targets by 22%.

Similarly, the receipts generated by tourism in 2023 reached JD 5.253 billion an increase of 27.4% Vs. 2022 and 27.9% increase on 2019, thus surpassing MoTA’s targets by 15.8%. Additionally, in 2023, tourism receipts as a percentage of Gross Domestic Product (GDP) grew to 14.6%.

The unprecedented influx of visitor numbers is acknowledged by UN Tourism, who report that “Jordan ranked among the 15 countries worldwide with the highest increase in international tourist arrivals in 2023 compared to 2019.”<sup>3</sup>

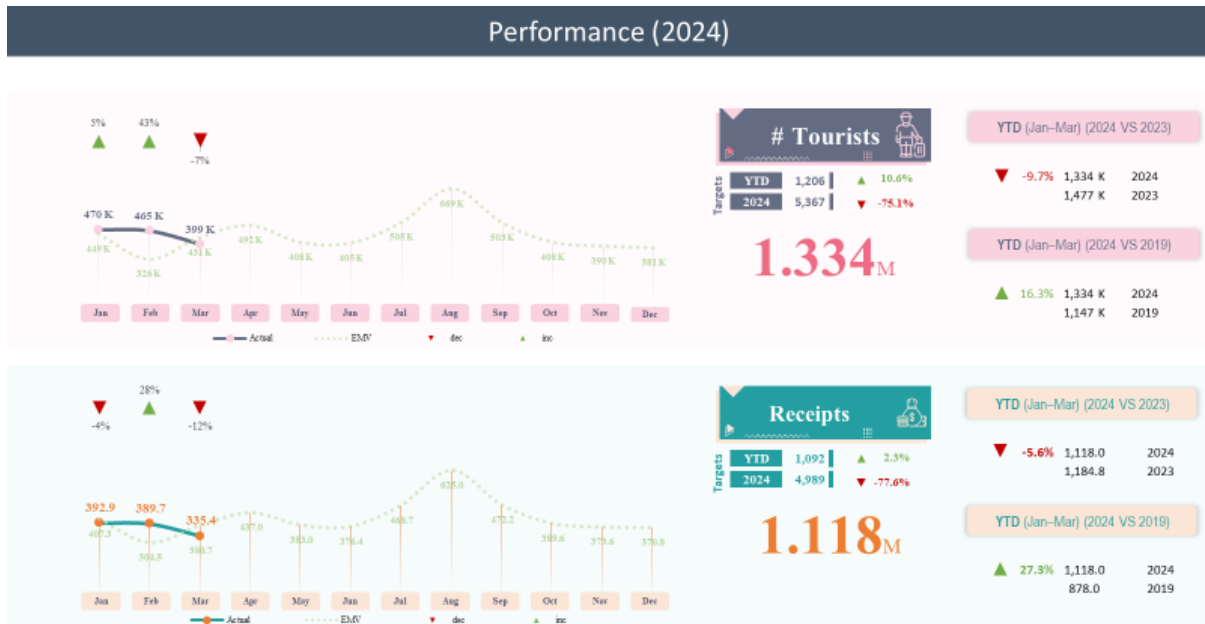
However, the impact of the War on Gaza on tourism in Jordan began to surface in the last quarter of 2023 and this downward trend continued into Q1 of 2024.



<sup>2</sup> 2019 is internationally recognized as the “base year” for tourism performance according to UN Tourism

<sup>3</sup> UN Tourism – Tourism Doing Business, Investing in Jordan, April 2024

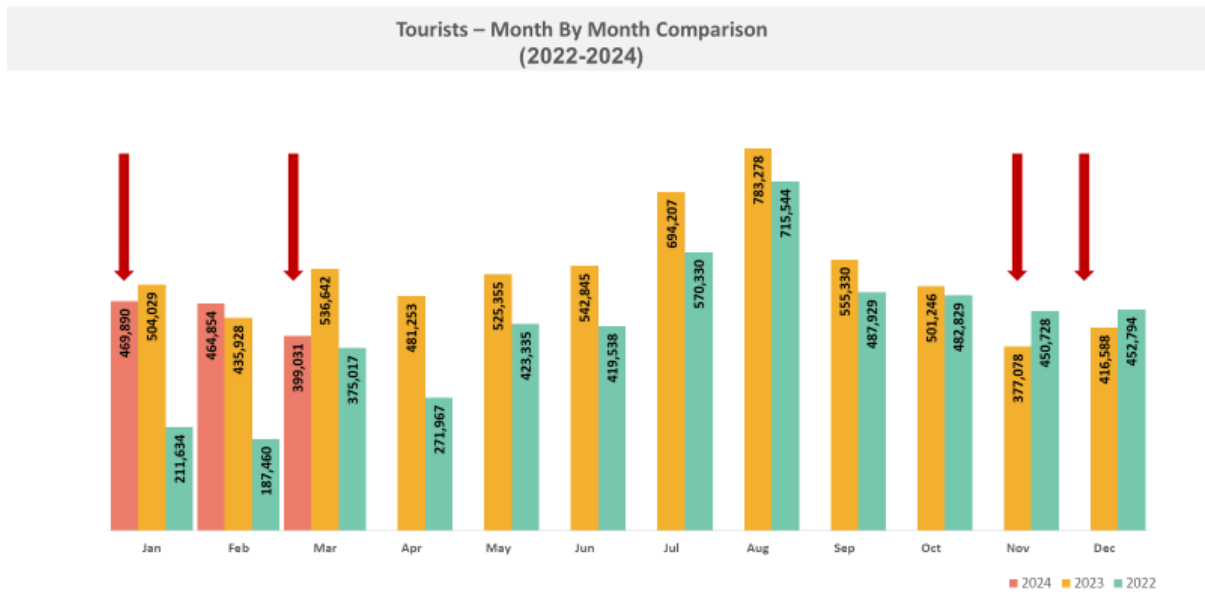
### 3. TOURISM PERFORMANCE SUMMARY – Q1 2024



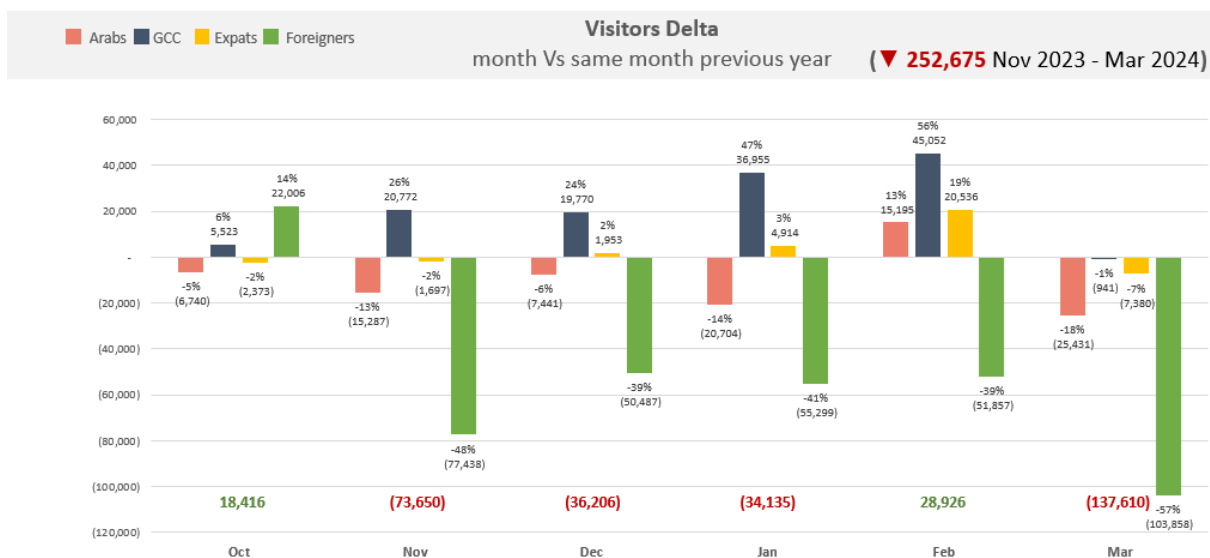
The first quarter of 2024 witnessed a 9.7% decrease in the number of tourists compared to the same period of 2023, thus reaching a total of 1.334 million tourists. Similarly, the total receipts declined by 5.6% over the same period, settling at JD 1.118 billion. Despite such declines, the number of tourists and total receipts are above MoTA’s targets for Q1 2024 and target/achievements of Q1 2019.

The biggest monthly decline (7% in the number of tourists and 12% in receipts) occurred in March 2024. It is also worth keeping in mind that this year, Ramadan which is traditionally a slow month for tourism occurred in March 2024.

## 4. IMPACT OF WAR ON GAZA

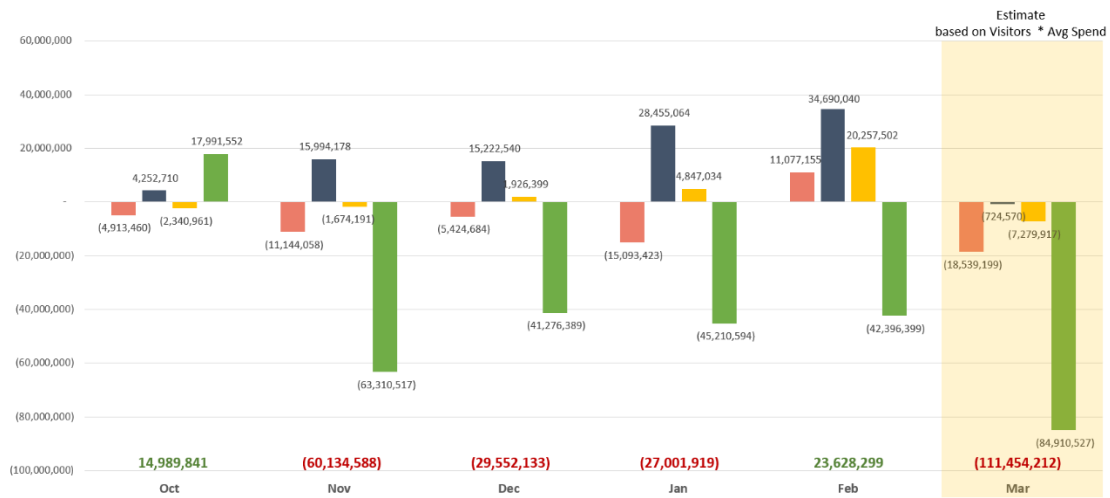


As can be seen, the impact of the war on Gaza commenced in November 2023 and continued through to first quarter of 2024, with the exception of February 2024.



Further analysis revealed that the most significant decline came from International (European and North American) tourists, but this was partially offset by an increase in GCC tourists and Jordanian Expats. November 2023-March 2024 witnessed a “loss” of 252,675 tourists compared to the same period of previous year(s), with the biggest net loss occurring in March 2024.

**Receipts Delta**  
Financial impact of "loss" in tourist's numbers **(204,514,553 JD Nov 2023 - Mar 2024)**



By taking the average expenditure of each segment (International, GCC, Arab and Expats) into consideration, it can be deduced that the tourism sector in Jordan 'lost'/would have gained an additional 205 million JDs between November 2023 and March 2024 had Jordan received the same number of tourists in previous/similar timelines.

It is worth noting that the main clients of hotels are international tourists, hence a drop in their numbers will significantly reduce hotel occupancy rates; conversely the increase in GCC, Arab and Jordanian Expats may not fully compensate the absence of international tourist as far as hotel occupancy rates are concerned due the fact that these segments are more likely to have their own accommodation and tend to visit rural areas where there is a dearth of hotels.

Year	Location	Classification	Actual											
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	Amman	5 Star	44%	54%	64%	51%	73%	58%	69%	66%	70%	63%	43%	45%
		4 Star	46%	57%	69%	60%	72%	57%	68%	64%	69%	64%	45%	37%
		3 Star	36%	47%	52%	49%	57%	49%	64%	59%	58%	46%	32%	32%
	Dead Sea	5 Star	39%	48%	66%	70%	75%	64%	57%	60%	70%	60%	31%	24%
		4 Star	37%	49%	71%	79%	83%	53%	48%	54%	74%	76%	36%	16%
	Petra	5 Star	42%	52%	73%	80%	80%	55%	33%	46%	69%	68%	31%	16%
		4 Star	46%	58%	77%	70%	63%	39%	30%	37%	58%	54%	27%	15%
		3 Star	23%	41%	62%	71%	53%	26%	22%	29%	56%	40%	25%	7%
	Aqaba	5 Star	58%	49%	81%	94%	75%	77%	85%	83%	84%	36%	21%	20%
		4 Star	44%	44%	62%	51%	59%	40%	50%	63%	69%	53%	38%	28%
		3 Star	34%	36%	55%	49%	40%	28%	33%	66%	57%	31%	29%	17%
	2024	Amman	5 Star	41%	56%	37%	44%	52%	51%	46%	44%	45%	50%	49%
4 Star			35%	45%	35%	43%	40%	42%	40%	41%	38%	43%	41%	42%
3 Star			32%	40%	39%	28%	30%	31%	29%	30%	24%	28%	30%	31%
Dead Sea		5 Star	17%	31%	29%	38%	45%	46%	42%	44%	40%	38%	39%	35%
		4 Star	13%	17%	24%	25%	28%	35%	28%	28%	29%	27%	18%	16%
Petra		5 Star	17%	19%	23%	19%	11%	10%	9%	9%	12%	12%	13%	8%
		4 Star	8%	11%	18%	20%	13%	12%	8%	8%	10%	11%	12%	7%
		3 Star	6%	3%	8%	6%	6%	7%	4%	5%	8%	7%	3%	4%
Aqaba		5 Star	30%	36%	40%	54%	45%	50%	52%	60%	64%	40%	45%	50%
		4 Star	29%	46%	31%	35%	37%	30%	32%	40%	45%	42%	37%	40%
		3 Star	37%	32%	31%	40%	35%	27%	30%	35%	40%	37%	39%	40%

The biggest impact of the war on Gaza is most apparent in the Hotel segment especially in



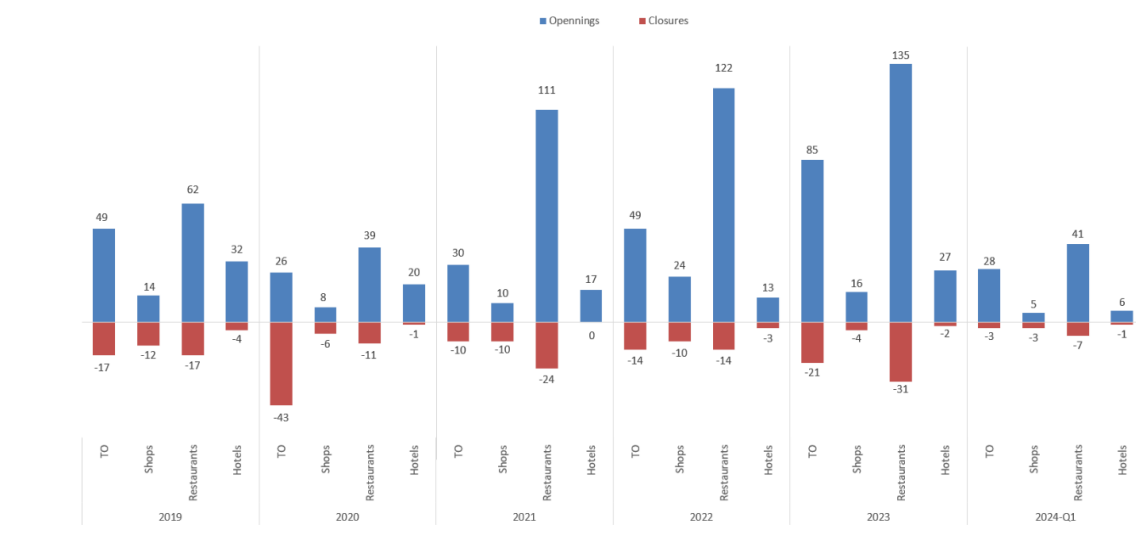
the Golden Triangle (Aqaba, Petra and Wadi Rum) with occupancy rates in Petra dipping to a record low of 3%. This is due to a number of factors including:

- Cancellation of 23 charter flights to Aqaba from (18 October-31<sup>st</sup> December 2023)<sup>4</sup>
- Transavia: cancelled its two flights/week from Paris to Aqaba in the Winter Season 2023.<sup>5</sup>
- Wizz Air: cancelled two winter season routes to Aqaba and one to Amman in Feb 24.<sup>6</sup>
- Edelweiss Air: canceled their only route from Zurich to Amman/Aqaba in Winter Season 2023.<sup>7</sup>
- EasyJet: cancelled all 7 planned winter 2023 season routes to Aqaba.<sup>8</sup>
- Ryanair: planned to operate 18 routes (10 Year-Round + 8 Winter Season destinations) but ended up cancelling 4 of these to Amman and all 7 winter 2023 routes to Aqaba. Additionally, it cancelled 15 Summer 2024 routes, thus only operating three routes till October 2024.<sup>9</sup>
- Cancellation of 49 cruise ship trips for 2023-2024 seasons<sup>10</sup>
- Over 70% of the visitors to Petra are international tourists, whose numbers declined significantly due to the war on Gaza.

The Restaurant sector is also heavily impacted by the war on Gaza, especially the branded “fast food” chains who report an 85% drop in revenues<sup>11</sup> due to a boycott of their products.

The Inbound Tour Operators also paint a fairly bleak picture with cancellation rates for inbound tourist groups reaching 90% for the period of October 2023-January 2024 in addition of a predicted cancellation rate of 93% for the period of February-June 2024<sup>12</sup>.

Despite the negative impact of the war on Gaza, the tourism sector remains resilient, with the number of newly-registered tourism establishments outpacing the number those closing down. This phenomenon is apparent even in times of turbulence such as COVID-19 period and Q1 2024.<sup>13</sup>



<sup>4</sup> Source: ASEZA

<sup>5</sup> Source: Jordan Tourism Board

<sup>6</sup> Source: Jordan Tourism Board

<sup>7</sup> Source: Jordan Tourism Board

<sup>8</sup> Source: Jordan Tourism Board

<sup>9</sup> Source: Jordan Tourism Board

<sup>10</sup> Source: ASEZA

<sup>11</sup> Source: Jordan Restaurant Association

<sup>12</sup> Source: JITO (Jordan Inbound Tour Operators Association)

<sup>13</sup> Source: MoTA – Licensing Department



## 5. PREDICTIONS FOR 2024

MoTA's commitments to the Economic Modernization Vision include a 10% YoY growth in tourism receipts for the period 2023-2033, which amounts to JD 4.989 billion in 2024<sup>14</sup>.

The worst drop in receipts since the start of the war on Gaza was in March 2024, which amounted to 12% drop below the target for same month. Hence if such a trend of decline (-12%) continues for the rest of 2024 (Ceteris Paribus), the potential loss of receipts will in Q1 2024 amount to JD 131 million, JD 275 million for H1 2024 and JD 599 million for the whole of 2024. These figures are consistent with predictions made by the Jordan Strategy Forum<sup>15</sup> who predicted a loss of 135 million for Q1 2024 and JD 270 for H1 2024.

	target	-10%	-20%	-30%	-40%	-50%	-60%	-70%	-80%	-90%	-100%	-12%			
Jan	407	(41)	(81)	(122)	(163)	(204)	(244)	(285)	(326)	(366)	(407)	(49)	(131)	(275)	(599)
Feb	304	(30)	(61)	(91)	(122)	(152)	(182)	(213)	(243)	(274)	(304)	(36)			
Mar	381	(38)	(76)	(114)	(152)	(191)	(229)	(267)	(305)	(343)	(381)	(46)			
Apr	437	(44)	(87)	(131)	(175)	(219)	(262)	(306)	(350)	(393)	(437)	(52)			
May	383	(38)	(77)	(115)	(153)	(192)	(230)	(268)	(306)	(345)	(383)	(46)			
Jun	376	(38)	(75)	(113)	(150)	(188)	(226)	(263)	(301)	(338)	(376)	(45)			
Jul	469	(47)	(94)	(141)	(188)	(235)	(281)	(328)	(375)	(422)	(469)	(56)			
Aug	625	(63)	(125)	(188)	(250)	(313)	(375)	(438)	(500)	(563)	(625)	(75)			
Sep	472	(47)	(94)	(142)	(189)	(236)	(283)	(330)	(378)	(425)	(472)	(57)			
Oct	390	(39)	(78)	(117)	(156)	(195)	(234)	(273)	(312)	(351)	(390)	(47)			
Nov	374	(37)	(75)	(112)	(150)	(187)	(224)	(262)	(299)	(337)	(374)	(45)			
Dec	371	(37)	(74)	(111)	(148)	(186)	(223)	(260)	(297)	(334)	(371)	(45)			
<b>Total</b>	<b>4989.0</b>	<b>-498.9</b>	<b>-997.8</b>	<b>-1496.7</b>	<b>-1995.6</b>	<b>-2494.5</b>	<b>-2993.4</b>	<b>-3492.3</b>	<b>-3991.2</b>	<b>-4490.1</b>	<b>-4989.0</b>	<b>-598.7</b>			

The potential loss of receipts for other scenarios (various percentage losses) can be extrapolated from the table above.

<sup>14</sup> Base year is 2023 - receipts for 2022 = JD 4.123 billion

<sup>15</sup> Jordan Strategy Forum – "The Reality of the Tourism Sector in Jordan - Between recovery time and the turmoil in the region, February 2024.

## **6. PRIORITIES FOR 2024**

In pursuit of continuous improvement and resilience to deal with the challenges that face the tourism sector especially during times of turbulence such as COVID-19 and the war on Gaza, MoTA will be focusing on the following priorities during 2024 and beyond.

### **6.1. Economic Modernization Vision Requirements**

MoTA will deliver its commitments to the Economic Modernization Vision (EMV) by following up on all of the government priorities that are specific to tourism, each of which consists of a number of activities with specific delivery dates. MoTA will monitor the performance of these activities on a monthly basis and report to the Prime Ministry Delivery Unit (PMDU). Additionally, MoTA will focus its efforts and activities to ensure the delivery of the 10% YoY growth in tourism receipts as specified in the EMV.

### **6.2. Connectivity**

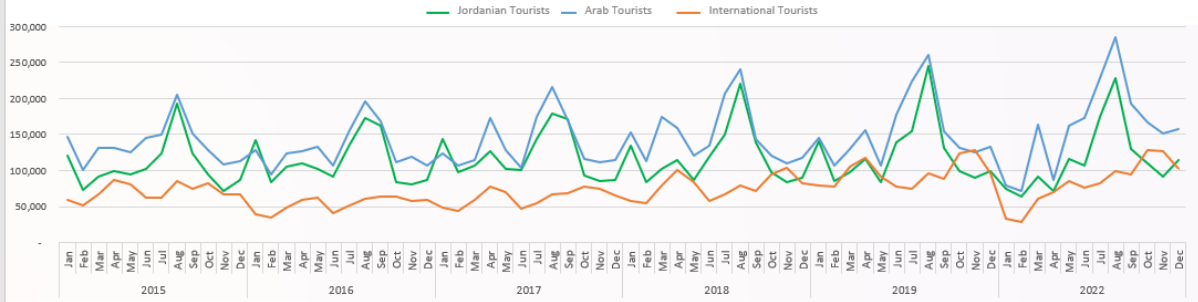
The war on Gaza has diminished the level of air connectivity between Jordan and tourism source markets due to the cancellation/reduction of routes operated by Low Cost Carriers e.g. Ryanair reduced its routes to Jordan from 25 to 3 and others such as easyJet cancelled all its flights. In 2023, these carriers operated 2,925 flights to Jordan, carrying 445,856 tourists 82% of which are international tourists.

MoTA will endeavor to compensate such losses by providing financial incentives to airline operators such as LCCs, Charter Flights and Regular Operators including Royal Jordanian to expand their routes networks from existing/new tourism source markets.

### **6.3. Seasonality**

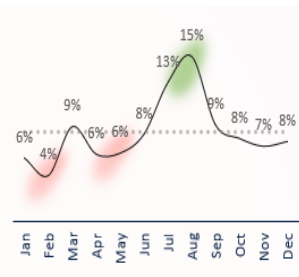
One of the biggest challenges faced by the Jordanian tourism sector is that of seasonality, whereby the low season poses a number of issues such as underutilized resources, thus impacting hotel occupancy rates, reduced revenues and diminished employment. To reduce the negative impacts of seasonality fluctuations, MoTA will develop bespoke/targeted marketing campaigns for each segment that will include financial incentives for tour operators who extend the tourist length of stay to 6+ nights, joint marketing campaigns, sponsorships of large events/festivals/conferences in the low season etc. Marketing plans to combat the impact of seasonality will be developed based on high level of patterns of tourist segmentation (International, Arab and Jordanian Expats) as well at lower levels of granularity (country level).

## Targeted Marketing to reduce seasonality

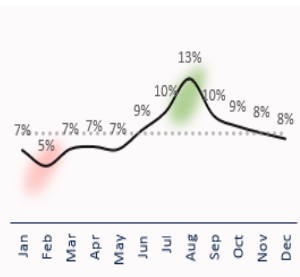


International Tourists	# Tourists	Below Peak	% Below Peak	Jordanian Tourists	# Tourists	Below Peak	% Below Peak	Arab Tourists	# Tourists	Below Peak	% Below Peak	
2022	Jan	32,481	(95,131)	-75%	Jan	74,179	(153,803)	-67%	Jan	78,894	(206,321)	-72%
	Feb	28,502	(99,110)	-78%	Feb	63,219	(164,763)	-72%	Feb	71,418	(213,796)	-75%
	Mar	61,063	(66,548)	-52%	Mar	91,581	(136,401)	-60%	Mar	164,444	(120,771)	-42%
	Apr	69,282	(58,329)	-46%	Apr	71,523	(156,459)	-69%	Apr	87,513	(197,702)	-69%
	May	85,008	(42,604)	-33%	May	116,805	(111,177)	-49%	May	162,511	(122,704)	-43%
	Jun	75,888	(51,723)	-41%	Jun	106,594	(121,387)	-53%	Jun	172,728	(112,487)	-39%
	Jul	82,320	(45,291)	-35%	Jul	174,486	(53,496)	-23%	Jul	228,438	(56,777)	-20%
	Aug	99,614	(27,997)	-22%	Aug	227,982	-	0%	Aug	285,214	-	0%
	Sep	93,841	(33,771)	-26%	Sep	129,377	(98,605)	-43%	Sep	193,196	(92,018)	-32%
	Oct	127,611	-	0%	Oct	110,414	(117,568)	-52%	Oct	166,600	(118,615)	-42%
	Nov	126,362	(1,249)	-1%	Nov	92,003	(135,979)	-60%	Nov	150,931	(134,284)	-47%
	Dec	101,909	(25,702)	-20%	Dec	114,487	(113,495)	-50%	Dec	158,317	(126,897)	-44%

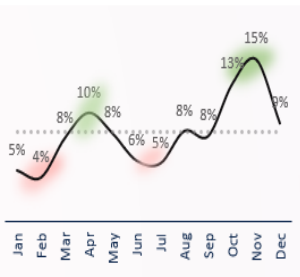
### GCC



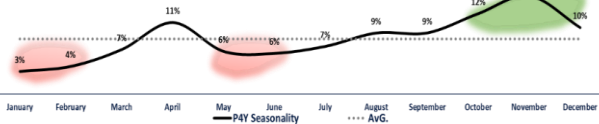
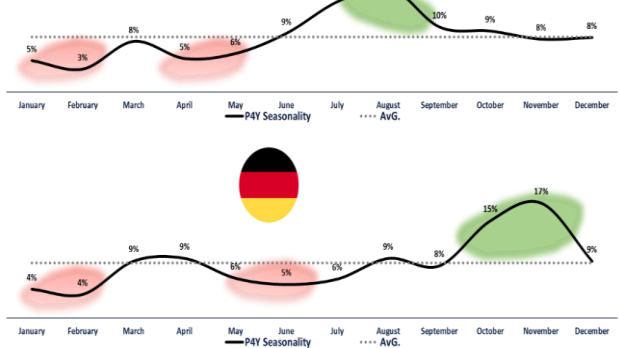
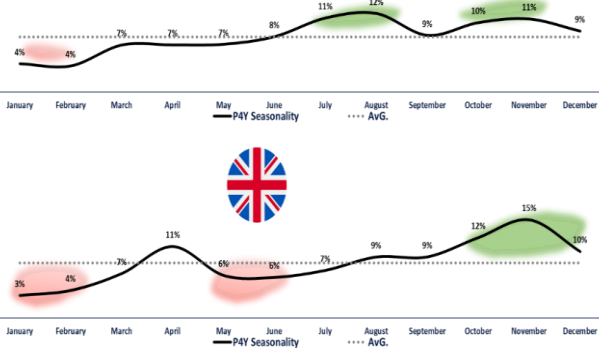
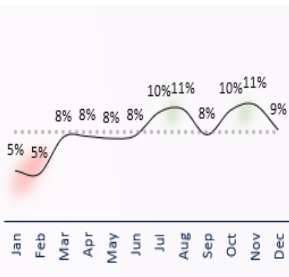
### Other Arab Countries



### Europe



### North America



## **6.4. New Products/Source Markets**

MoTA will pursue new source markets including, but not limited to the Chinese, Russian, African, Indian, Pakistani, Malaysian, Indonesian, Arab markets including foreigners residing in GCC countries. Marketing plans will also focus on various product segments e.g., Medical & Wellness + Faith tourism in Africa where a high percentage of the population are of the Christian faith such as Ethiopia (64% Christians), Kenya (85% Christians), and Rwanda (94% Christians) in addition to specific campaigns for Islamic faith tourism. Other product segments that are ripe for growth include adventure tourism and MICE tourism (Meetings, Incentives, Conferences and Exhibitions); To this end, MoTA will actively offer incentives to attract international conferences to take place in Jordan.

Additionally, MoTA will build on the declaration of Jordan as a regional hub for Medical & Wellness Destination by UN Tourism – to this end MoTA has formed a Wellness Council whose members are experts in this domain who are tasked with creating a long-term Wellness strategy in addition to the establishment of a Wellness Academy in the Dead Sea in collaboration with UN Tourism.

## **6.5. Investments**

Investments are the growth engine for the development and advancement of tourism in Jordan. MoTA, in collaboration with UN Tourism will publish “UN Tourism Investment Guide” for Jordan. Additionally, MoTA is currently conducting a Kingdom-wide scan of all potential tourism investment opportunities, which will form the basis for a “Tourism Investment Map” that will be published on [invest.jo](https://invest.jo).

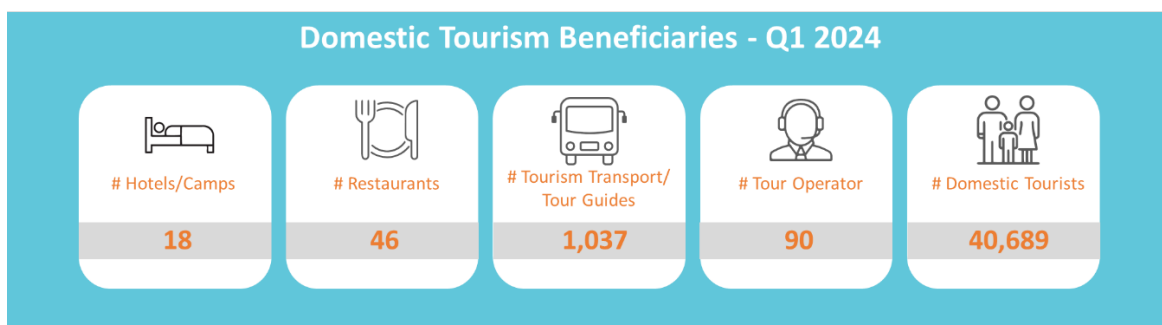
Furthermore, MoTA has established a “Tourism Development and Resilience Fund” as referenced in the newly-published Tourism Law in order to enable SME/Micro entrepreneurship and provide financial assistance to the sector in times of difficulties.

## **6.6. Training and Employment**

The tourism sector currently employs 54,856 employees, most of which are in the hotel/restaurant segment. MoTA’s training program, in line with the newly-released Training Strategy will focus on skilling, re-skilling and up-skilling of job seekers, existing employees and well as service providers in local communities. Additionally, training will be provided to “front liners” especially informal groups such as camel and horse riders in Petra, 4x4 vehicle drivers in Wadi Rum, local guides, tourism bus drivers, tourism police and passport control staff at border points.

## **6.7. Domestic Tourism (Urdunna Jannah)**

Despite the fact that revenues from domestic tourism do not contribute to MoTA’s receipts targets, this form of tourism is an important management tool that is utilized by MoTA to boost/restore economic activity in the tourism ecosystem – due to the economic difficulties faced by tourism entities in the Golden Triangle (Petra, Aqaba and Wadi Rum) as a result of the decline in international tourist in these locations, MoTA was able to direct domestic tourism to these location by sending 35,000 out of the 40,689 domestic tourists in Q1 2024 via its Urdunna Jannah program.



Additionally, the financial subsidies (free transport, free guide and discounts at restaurants/hotels/camps) provided by MoTA enable Jordanians with limited income to enjoy an abundance of Jordanian tourism destinations and provide economic activity to the various operators in the tourism ecosystem (hotels/camps, restaurants, tourism transport, tour guides and tour operators).

### 6.8. Site Management

Historical sites such as Jerash, Citadel, Mukawer, Umm Qais, Um ar-Rasas, Ajloun Castle, Aqaba Castle, Shobak Castle etc. are major tourism assets, therefore their Rehabilitation, Restoration, and Maintenance is a key priority for MoTA – to this end, MoTA will mobilize over 70 projects in pursuit of this important activity. Such projects will include new innovations such as the Research Center for Archaeological Studies and Storing of Artifacts at the Nuweijis Site, Tabarbour.

Additionally, MoTA will submit the file for Umm El Jimal to UNESCO to be acknowledged as a World Heritage Site.

### 6.9. Regulatory Reforms

MoTA will complete the activities associated with the new Tourism Law and its associated bylaws/instructions. Additionally, MoTA will focus its activities on classification of tourism entities, thereby leaving the licensing function to local authorities, hence improving the investor journey.

## 7. SUMMARY

2023 was a record year for tourism in Jordan. The war on Gaza has impacted the tail end of 2023 and continued through Q1 2024 mainly due to the decline in international tourist arrivals. Despite the fact that the tourism sector is of sensitive disposition, it has proved itself to be resilient and capable of swift recovery. MoTA and its key stakeholders including the Central Bank of Jordan, Social Security Corporation and the Development and Employment Fund as well as the various Tourism Associations are monitoring the situation on a daily basis and taking all possible actions to mitigate/reduce this impact and pave the path to a smooth recovery. Mitigation steps in support of tourism establishments thus far included:

- **Social Security Corporation:** adjournment of Social Security contributions according to the following terms and conditions:
  - Establishments wishing to benefit from financial facilitates provided by the Social Security Corporation must submit an installment request during the period from 01/05/2024 until 31/08/2024.
    - 01/05/2024 - 31/08/2024 - installment interest rate will be 0%
    - 01/09/2024 – 31/12/2024 - installment interest rate will be 2%
    - 01/01/2025 - 30/04/2025 - installment interest rate will be 4%.
    - 01/05-2025 onwards - installment interest rate will be 9%.
- **Central Bank of Jordan:** provided soft loans to the tourism sector equivalent to 6,399,400 JD
- **Development and Employment Fund:** provided soft loans to the tourism sector equivalent to 1.3 million JD

**END OF DOCUMENT**