



**CBI**

**Centre for the Promotion of Imports from  
developing countries**



**In cooperation with**



**JORDAN**

[visitjordan.com](http://visitjordan.com)



# **A Closer Look on...**

Exploring Tourism Opportunities in difficult times for  
**JORDAN**

**5<sup>th</sup> June 2024**



# What should you expect from this session?

Today we will be looking into the following:

- **The Current Tourism Situation in Jordan and nearby destinations**
- **Overall arrival numbers for Jordan from feeder markets**
- **Statistics of Q1 2024**
- **Markets we should look into... NOT ONLY IN TIMES OF CRISIS – Resilient Markets**
- **The Arab Market, (GCC) market mix, travel pattern, how they book, social media usage, and more...**
- **Major market players in the Arab Market**
- **Recommendations**



## Agenda...

<b>09:00 – 09:30</b>	<b>Gathering</b>
<b>09:30 – 09:40</b>	<b>Introduction (SPEAKERS)</b>
<b>09:40 – 10:15</b>	<b>The Current Situation</b>
<b>10:15 – 10:45</b>	<b>Jordan Tourism Board Analysis &amp; Research</b>
<b>10:45 – 11:00</b>	<b>Discussion</b>
<b>11:00 – 11:20</b>	<b>Coffee Break</b>
<b>11:15 – 11:45</b>	<b>Sustainability Trends &amp; Outlook</b>
<b>11:45 – 12:15</b>	<b>Seasonality</b>
<b>12:15 – 13:30</b>	<b>Brainstorming (Exercise - Seasonality)</b>
<b>13:30 – 14:30</b>	<b>Lunch</b>
<b>14:30 – 15:30</b>	<b>Resilient Markets</b>
<b>15:30 – 15:45</b>	<b>Discussion</b>
<b>15:45 – 16:00</b>	<b>Extending Length of Stay</b>
<b>16:00 – 16:45</b>	<b>Brainstorming (Exercise – Length of Stay)</b>
<b>16:45 – 17:00</b>	<b>Market Mix</b>
<b>17:00 – 17:15</b>	<b>Steps Forward</b>



# ADEL M AMIN

**Jordanian, multilingual tourism Expert & Advisor  
Tourism Strategy, Development & Marketing Expert**

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**Tourism Expert – CBI  
Tourism Advisor – Armenian Tourism Federation  
Lead Consultant – Blue Skies Consultancy - UK**

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**35+ Years of Experience in the Tourism Industry in  
Jordan and abroad**

- **13 Years Radisson Hotels Worldwide (Director of Sales & Marketing – Jordan) & Executive Assistant Regional General Manager**
- **12 Years (Director of Sales & Marketing) Dakkak Tours - Jordan**
- **5 Years (Director of Marketing & Deputy MD JTB)**
- **5 Years Advisor Armenian Tourism Federation**
- **4 Years Tourism Expert CBI**





# RAGHEED AL-MASRI

**Jordanian, multilingual tourism professional**

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**Tourism Strategy, Development & Marketing Expert**

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**GSTC Trainer**

**Travelife for Tour Operators - Coach and Auditor**

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**Masters in Internal Tourism Management**

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**25 years of experience in tourism in Jordan with private and public sectors and NGOs**

*Researcher, Trainer, Director, Project Leader, Grants Manager, Competitions Judge, Technical Expert, Strategy Advisor, Business planning, Presenter, Facilitator, Member of the Jordan Economic Modernization Vision 2033 – tourism group, Environmental Activist & Volunteer*







# LINA AL-KHALED

**Jordanian, multilingual tourism professional**

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**Tourism Strategy, Development & Marketing Expert**

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**GSTC Trainer**

**Travelife for Tour Operators - Coach and Auditor**

---

**Masters in Internal Tourism Management**

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# RAWAN ATALLAH

**Tourism Product Development Expert** (over 18 Years)

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**Certified Travelife auditor and coach for tour operators**

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**Approved Trainer for the GSTC Criteria**

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**Community-based Tourism development advisor for local SMEs and CBOs**

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**Tourism researcher, trainer and consultant for different donors and development agencies**  
(USAID, EU, WB, GIZ, FAO and CBI)





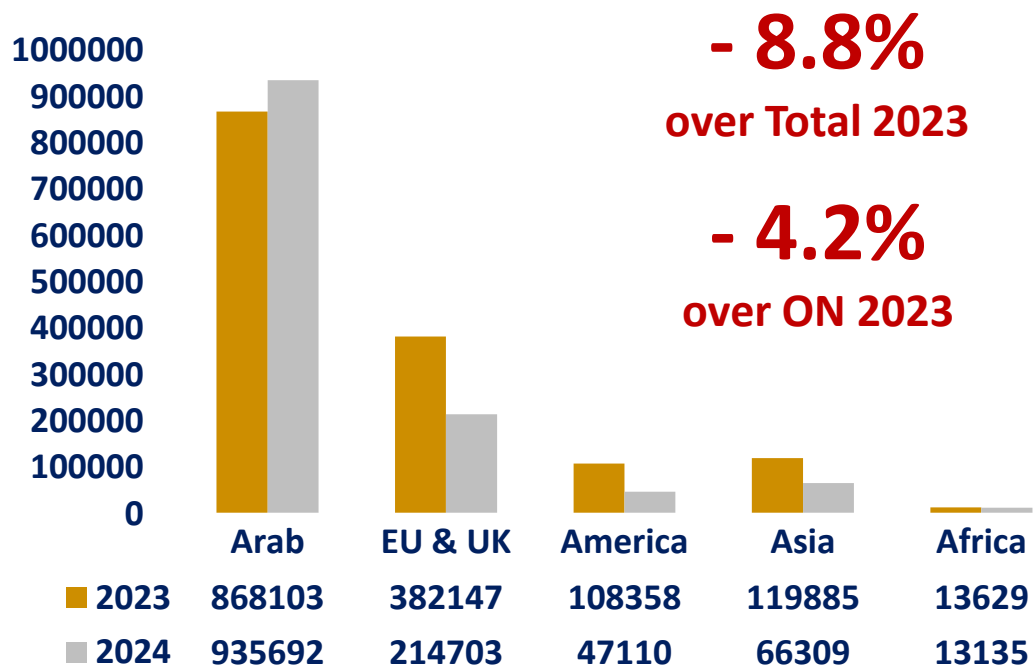
# **THE CURRENT SITUATION**



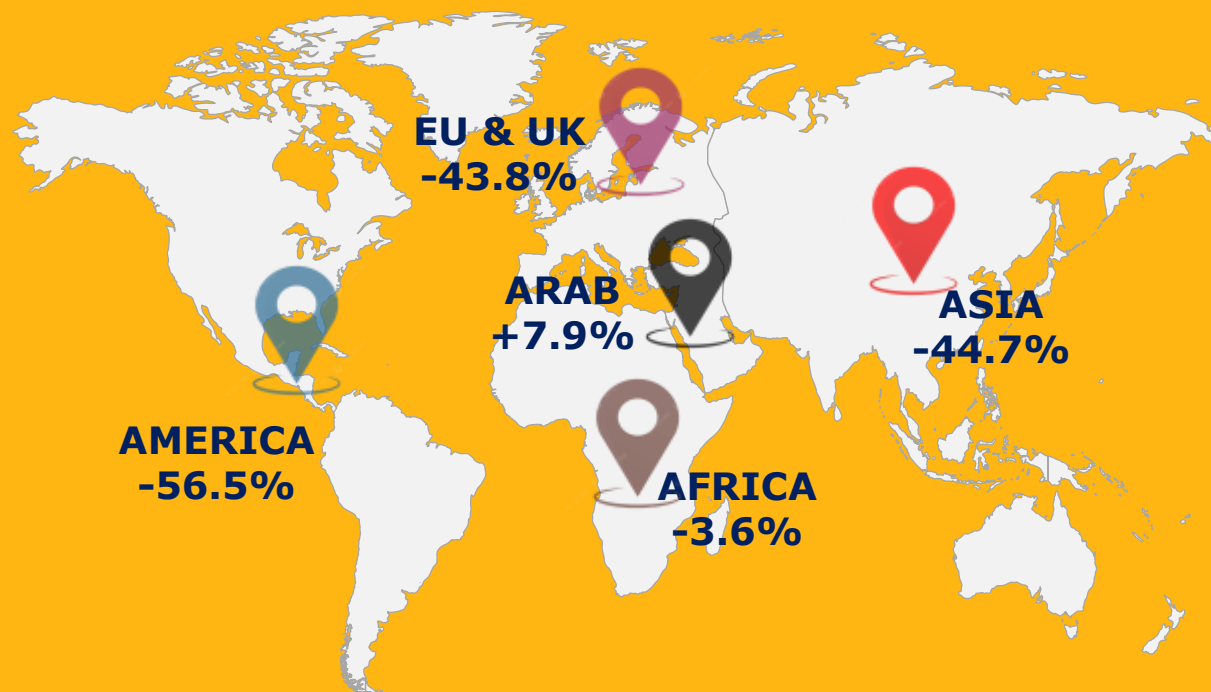
## The current situation

With the ongoing political unrest in our region, as we all know, tourism is negatively affected in Jordan. 2023 was a record year. Numbers of arrivals from all destinations were growing until Oct 2023.

Today, from Jan to end of Apr 2024, all markets are witnessing minus numbers in total arrivals except for the Arab Market, specifically the GCC market.



### Percentage of change Total Arrivals Jan – Apr 2024



### Jordan Total Arrivals Jan – Apr 2023

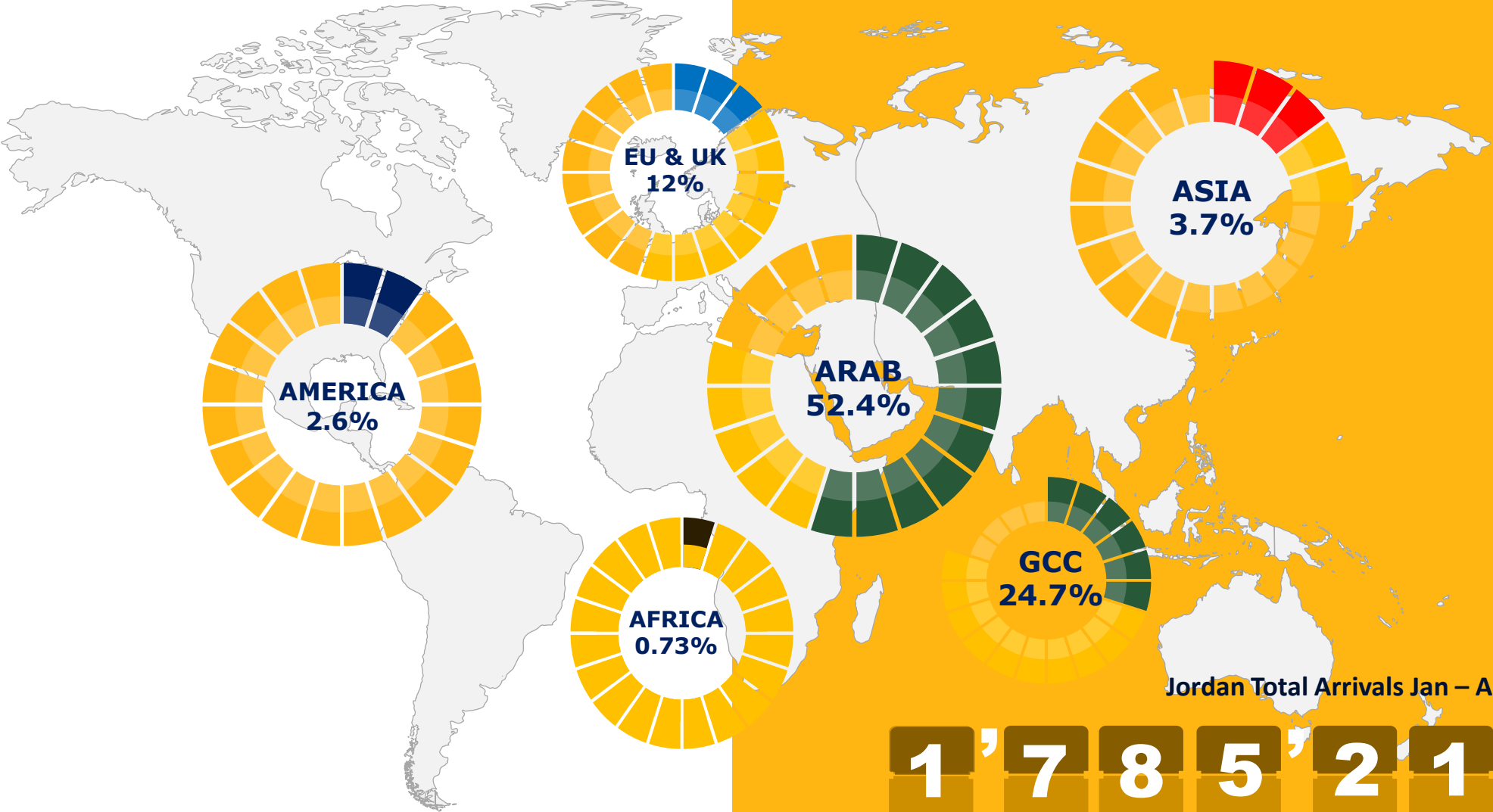
1'957'851

### Jordan Total Arrivals Jan – Apr 2024

1'785'217



# Markets share from total arrivals Jan – Apr 2024



Jordan Total Arrivals Jan – Apr 2024

1'785'217



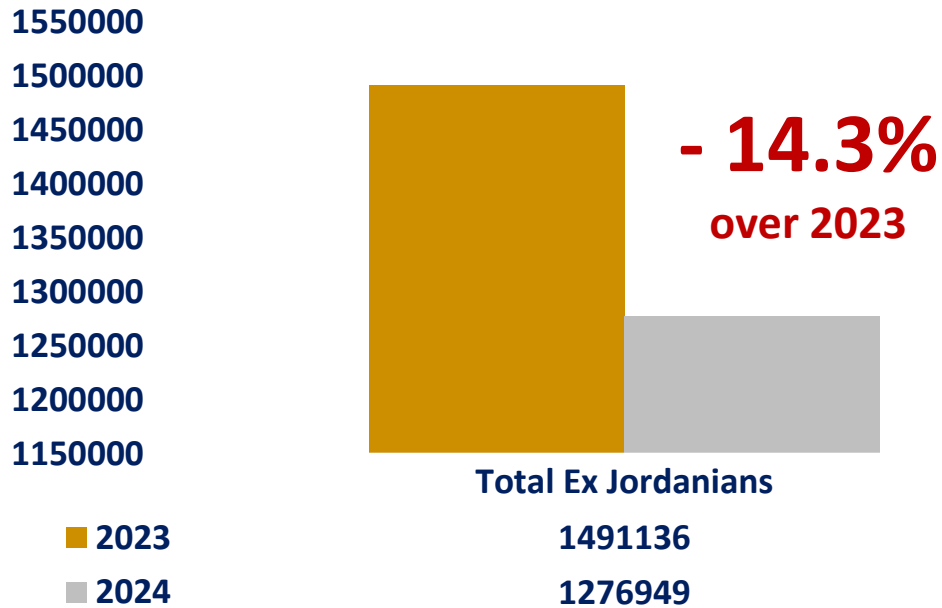
# Totals Excluding Jordanians

Jordan Total Arrivals Excluding Jordanians Jan – Apr 2023

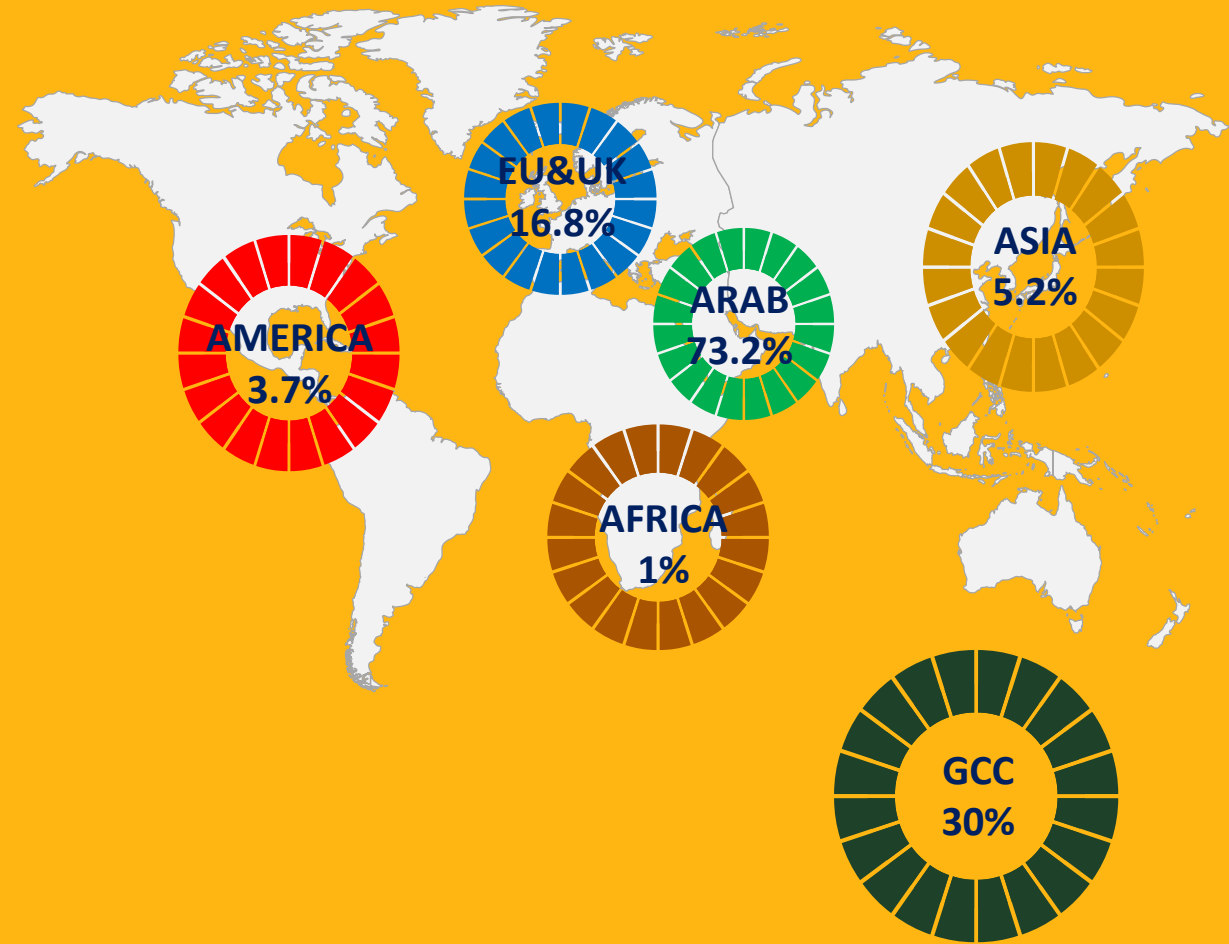
1 4 9 1 1 3 6

Jordan Total Arrivals Excluding Jordanians Jan – Apr 2024

1' 2 7 6' 9 4 9



Markets share from total arrivals Excluding Jordanians Jan – Apr 2024



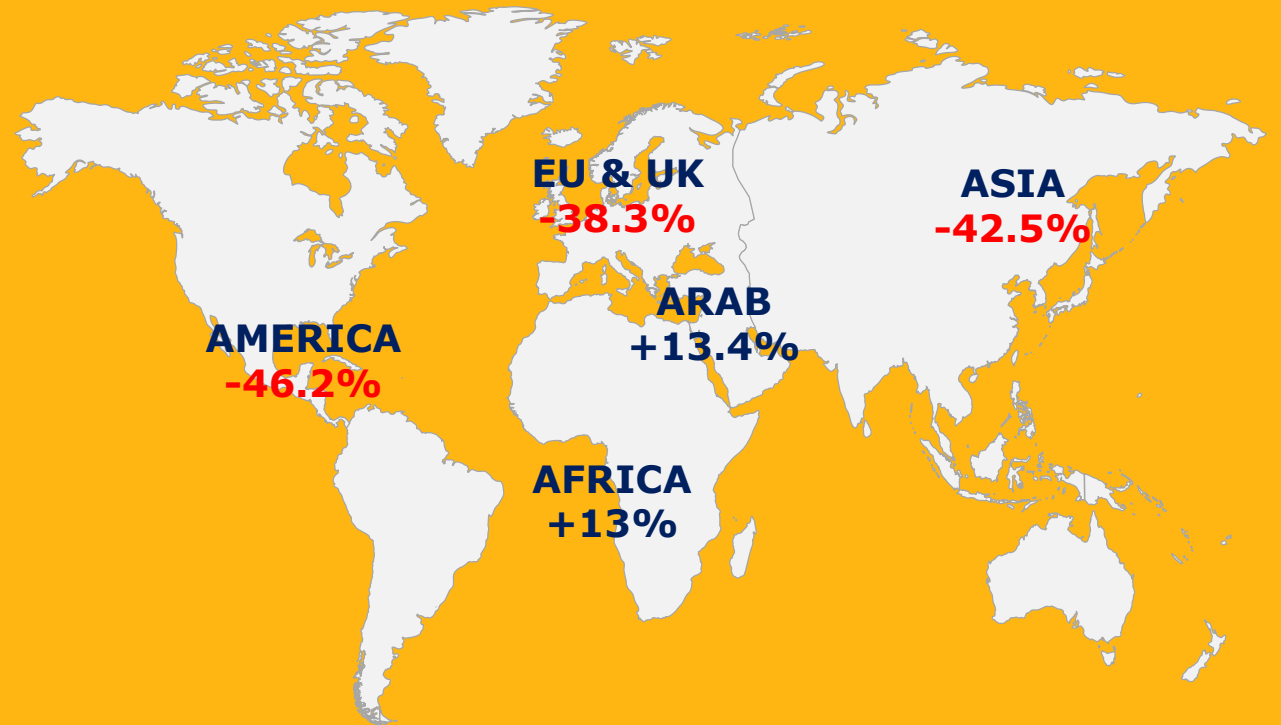
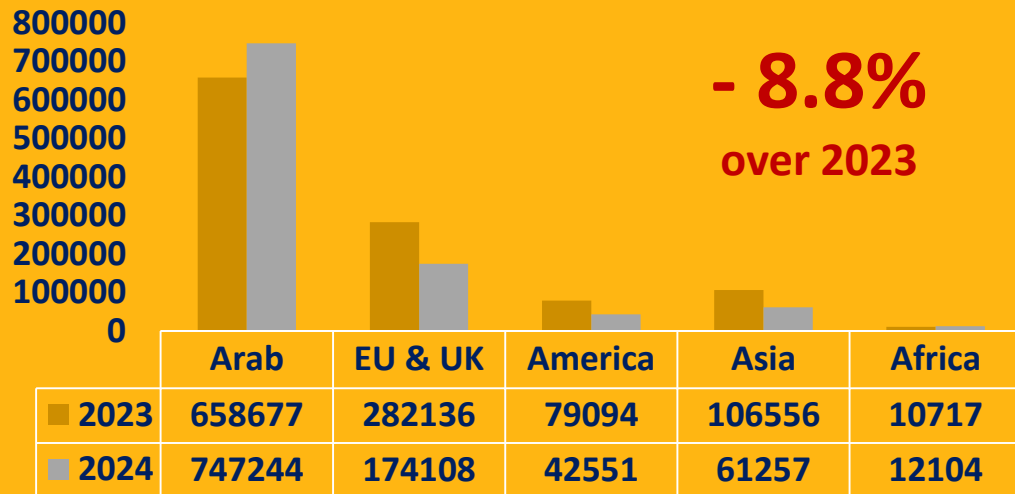
# Overnight Arrivals to Jordan

Jan – Apr 2024 *\*Excluding Jordanians*



Percentage of change Overnight Jan – Apr 2023 / 2024

**1 0 3 7 2 6 4**



Saudi Arabia



334'910

USA



28'940

Kuwait



23'009

India



13'604

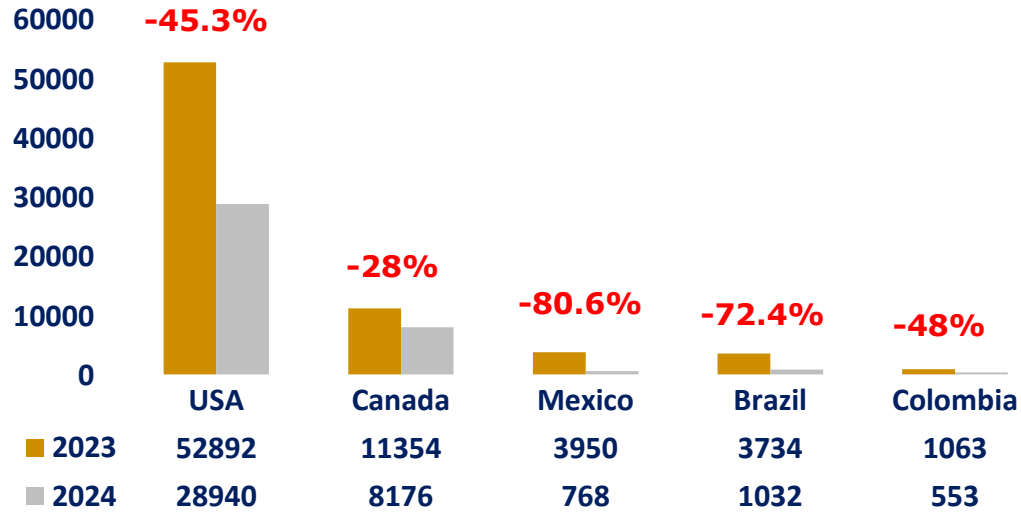
Germany



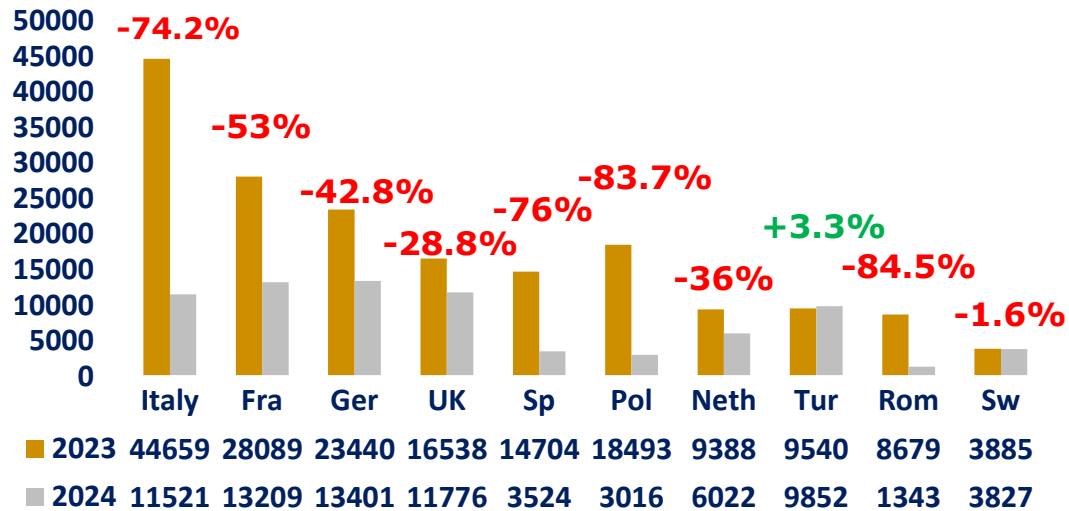
13'401



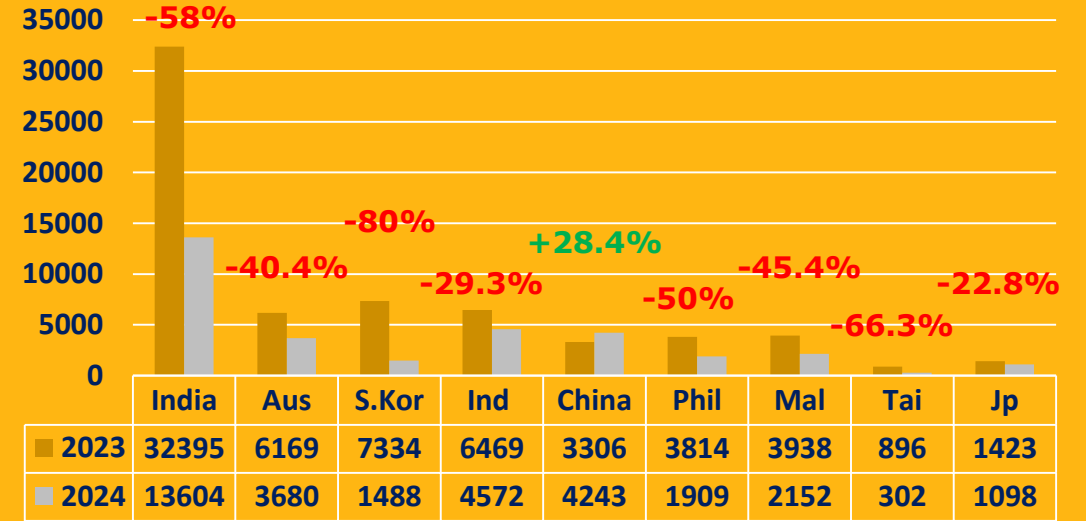
## America



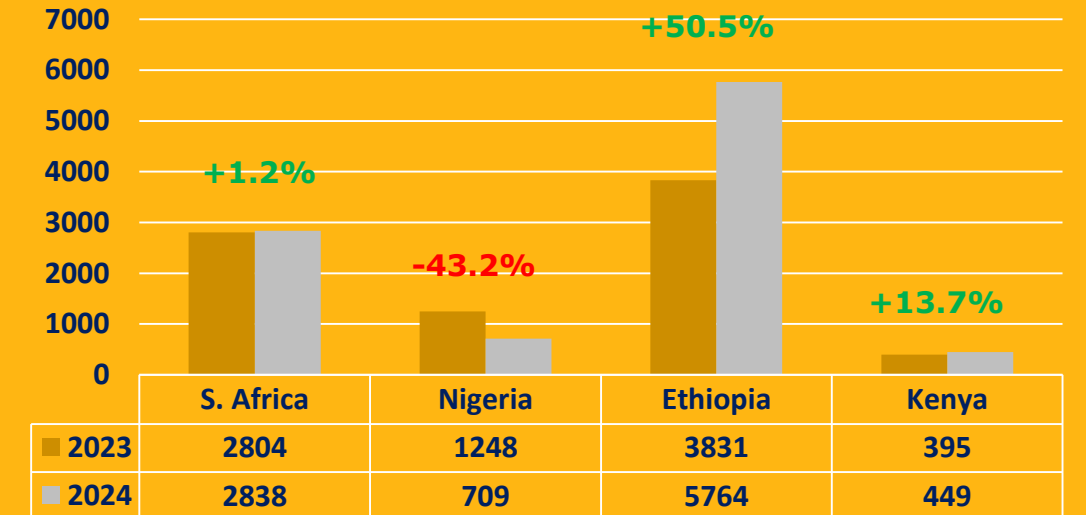
## EU



## ASIA

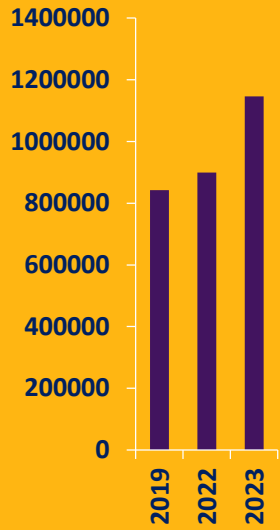


## AFRICA



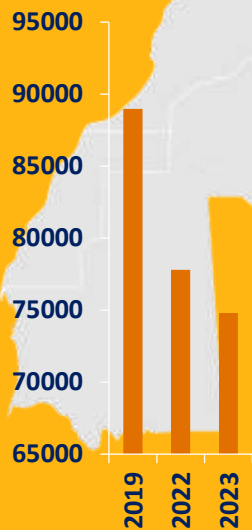


# The GCC Arrivals to Jordan Comparison 2019 / 2022 / 2023



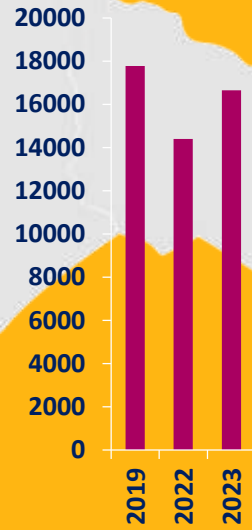
## Saudi Arabia

A steady increase throughout the years



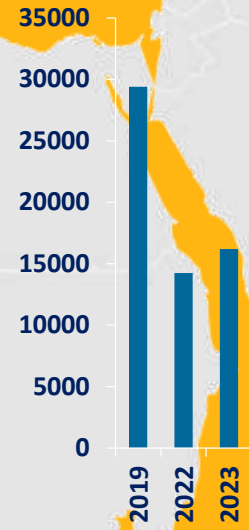
## Kuwait

Kuwait is one of the long staying guests in Jordan. A drop witnessed year on year!



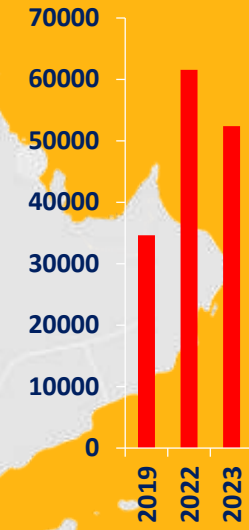
## UAE

UAE market more or less steady, yet it has a huge expat market that can be attracted.



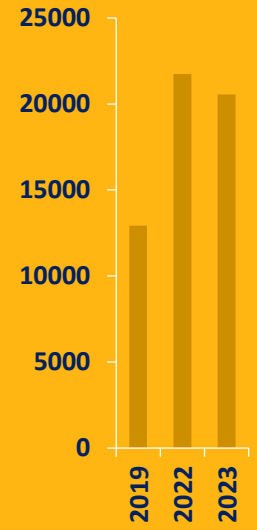
## Qatar

Qatar increase in 2019 was because of sanctions. But it proved that it has a potential



## Bahrain

Although a small market, yet its bringing in good numbers which can be increased

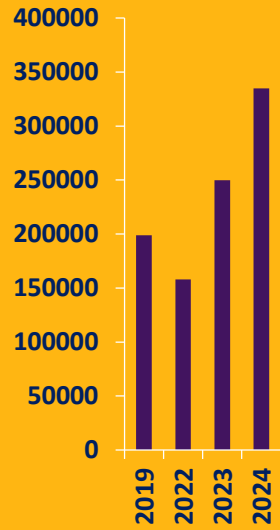


## Oman

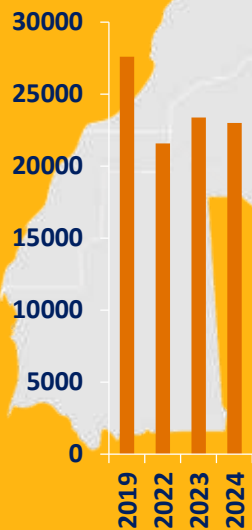
A market that has a potential to grow even more

# The GCC Overnights to Jordan Comparison

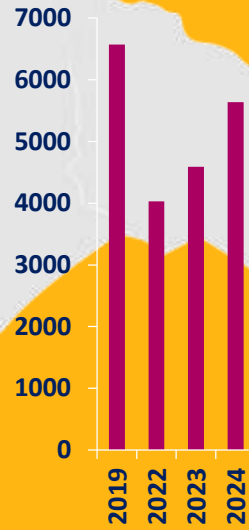
## Jan – Apr 2019 / 2022 / 2023 / 2024



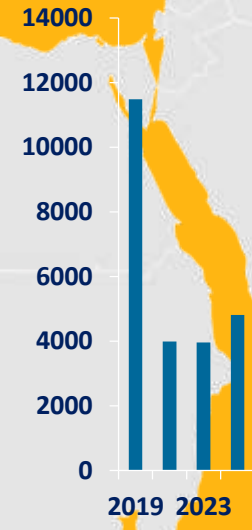
Saudi Arabia



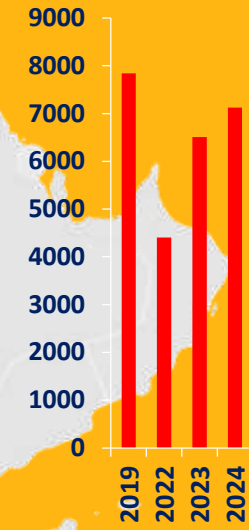
Kuwait



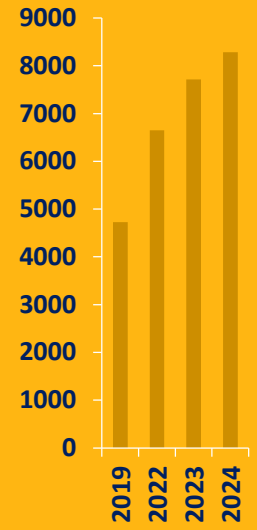
UAE



Qatar



Bahrain



Oman

JTB and in its plan for 2024 indicated that PR Campaigns in the GCC will take place specifically in KSA to further penetrate the market and tap into the large number of expats living there. They did also conduct in 2023 a marketing TV campaign at MBC & Shahed Networks during Ramadan. JTB also indicated that in 2024 they will continue to focus on the GCC as a prime source market.

# Arab Market Arrivals to Jordan

Jan – Mar 2024



## Total Arrivals

935692

## Overnight Arrivals

747244



SAUDI ARABIA



334'910

KUWAIT



23'009

OMAN



8'286

BAHRAIN



7'124

ALGERIA



6'494



## Nearby Destinations Performance Total Arrivals Q1 2024

**TURKEY**  
**+9.9%**

<https://www.dailysabah.com/business/tourism/istanbul-sees-fresh-record-with-52m-tourists-in-first-4-months>

**EGYPT**  
**+27%**

<https://egyptianstreets.com/2024/05/07/number-of-tourists-visiting-egypt-surges-in-2024-continuing-a-record-breaking-trend/>

**Dubai**  
**+11%**

<https://www.dubaidet.gov.ae/en/research-and-insights/tourism-performance-report-apr-2024>

**CYPRUS**  
**+1.7%**

<https://www.ekathimerini.com/economy/1239035/cyprus-tourism-rises-in-january-april-y-o-y/>

**MOROCCO**  
**+17%**

<https://www.moroccoworldnews.com/2024/05/362569/morocco-attracts-4-6-million-tourists-in-first-4-months-of-2024>

**ISRAEL**  
**-70%**

**JORDAN**  
**-9%**

**Based on the information and statistics shared,  
what should we do? Where to focus on?**



- Focusing on resilient markets in tourism for a destination is crucial for its long-term sustainability and success, especially in the face of unexpected challenges
- Relying on a diverse range of markets can mitigate the impact of downturns in any one market or markets.
- Diversifying Feeder Markets.
- Have a closer look on feeder markets to nearby destinations, analyse the figures, type of traveller and behaviour.
- Tackle Seasonality in Jordan so that we have a steady flow of tourism all year round.
- Increase length of stay.

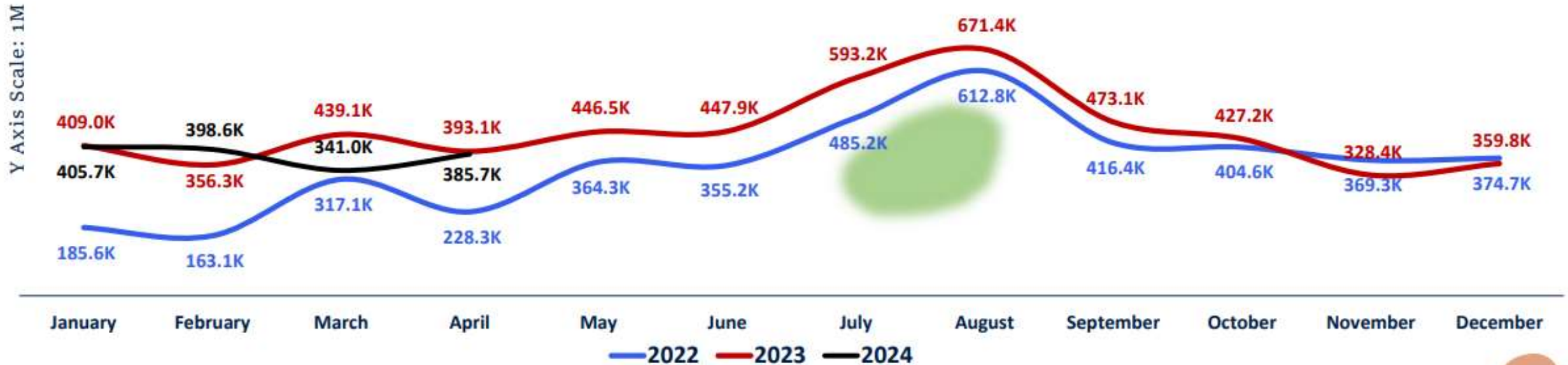


**ANALYSIS & RESEARCH**  
**JORDAN TOURISM BOARD**

# Overnight Arrivals

## All Nationalities

	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	347.6K	470.0K	35%	Jan-Apr Total	1.598M	1.531M	-4%
Oct-Dec avg	382.9K	371.8K	-3%				



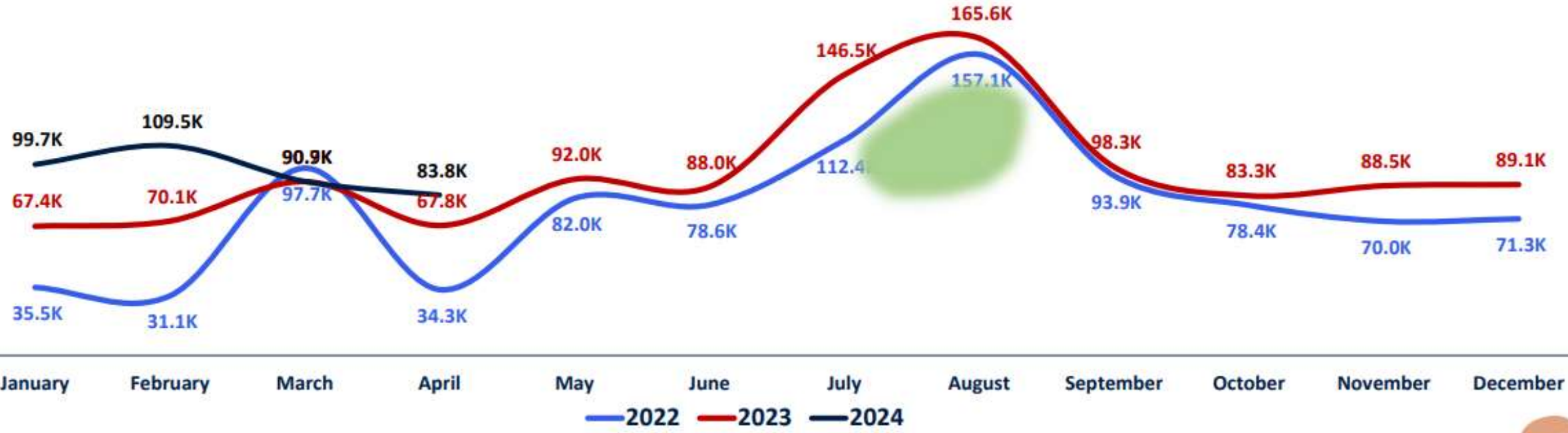
- Source: MOTA
- Overnight Tourists ONLY
- 3 • Average refers to P2Y overnight arrivals (22', 23')



# Overnight Arrivals GCC

	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	80.3K	98.5K	23%	Jan-Apr Total	295.9K	383.8K	30%
Oct-Dec avg	73.2K	87.0K	19%				

Y Axis Scale: 200K



- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')
- 4 • Includes Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Kuwait, & Oman.





# Overnight Arrivals

## KSA



	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	65.39K	83.82K	28%	Jan-Apr Total	249.76K	334.91K	34%
Oct-Dec avg	62.83K	77.17K	23%				



- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')
- 6 • Includes Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Kuwait, & Oman.

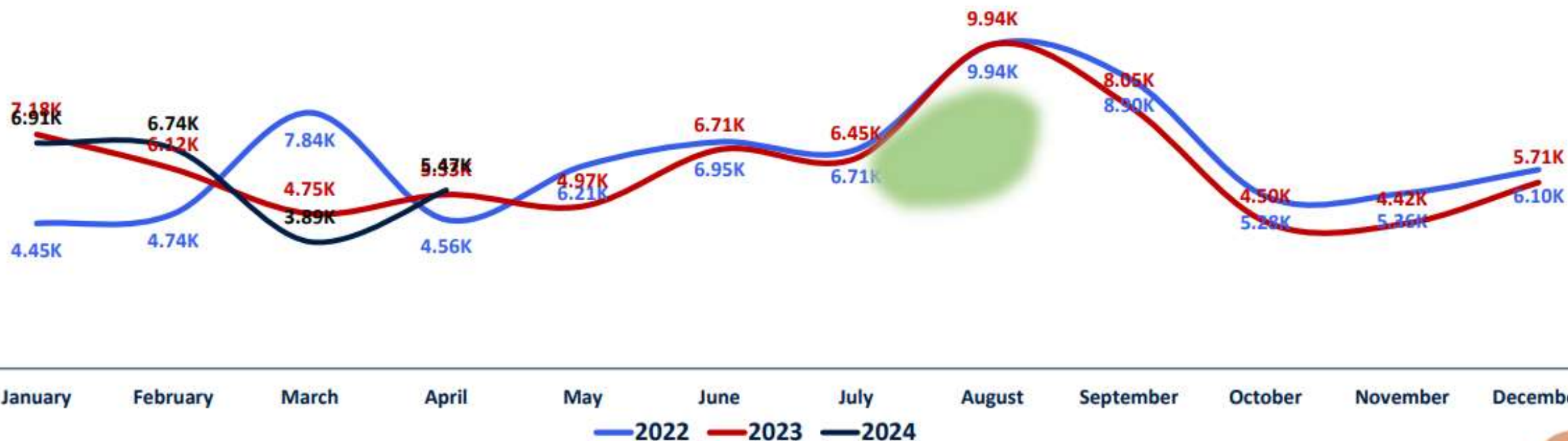


# Overnight Arrivals Kuwait



	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	6.70K	6.61K	-1%	Jan-Apr Total	23.38K	23.01K	-2%
Oct-Dec avg	5.58K	4.88K	-13%				

Y Axis Scale: 200K



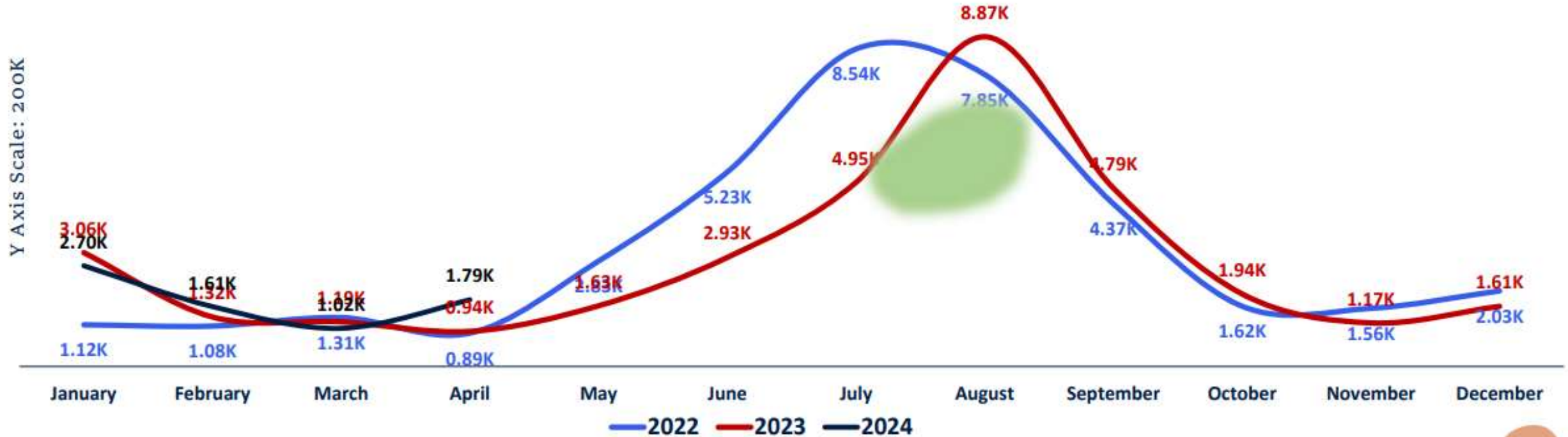
- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')
- 7 • Includes Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Kuwait, & Oman.



# Overnight Arrivals Bahrain



	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	3.69K	3.30K	-11%	Jan-Apr Total	6.51K	7.12K	9%
Oct-Dec avg	1.74K	1.57K	-9%				



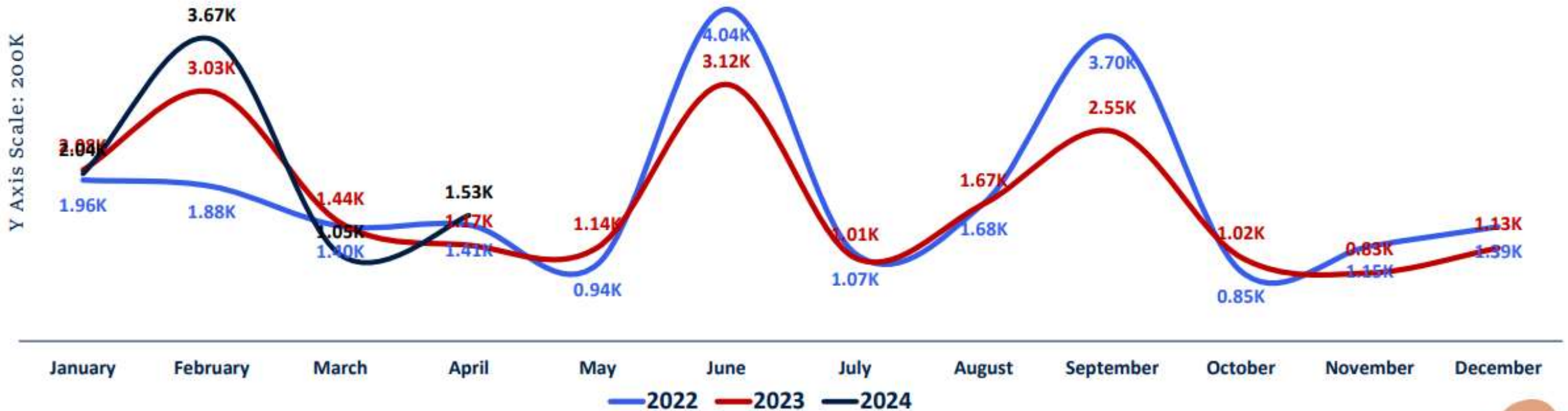
- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')
- 8 • Includes Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Kuwait, & Oman.



# Overnight Arrivals Oman



	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	2.01K	1.91K	-5%	Jan-Apr Total	7.72K	8.29K	7%
Oct-Dec avg	1.13K	0.99K	-12%				



- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')
- 9 • Includes Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Kuwait, & Oman.

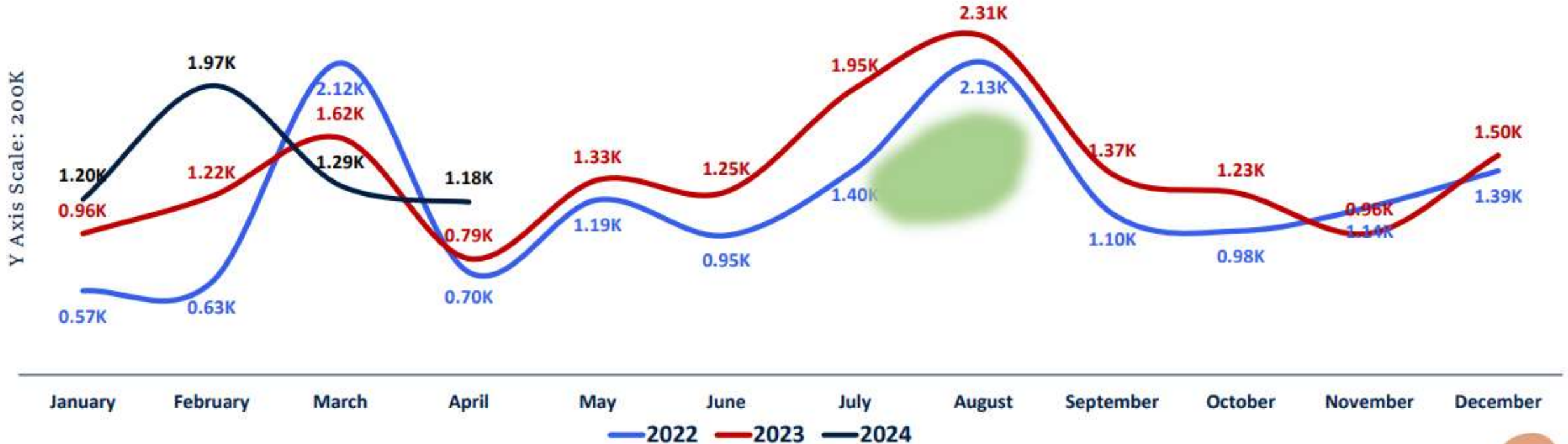


# Overnight Arrivals

## UAE



	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	1.20K	1.42K	18%	Jan-Apr Total	4.59K	5.64K	23%
Oct-Dec avg	1.17K	1.23K	5%				



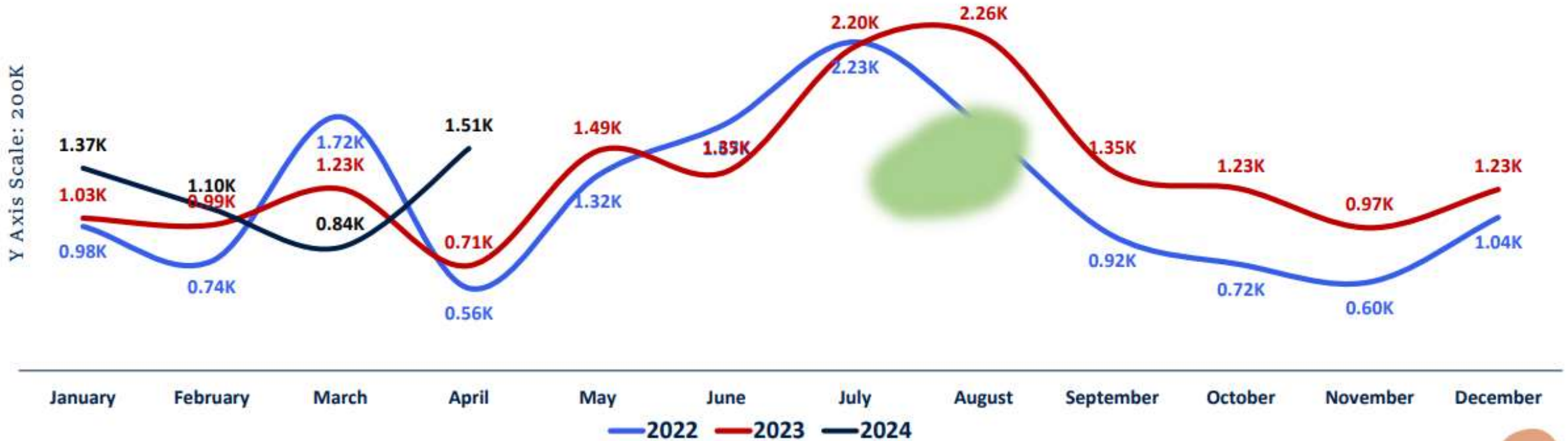
- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')
- Includes Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Kuwait, & Oman.



# Overnight Arrivals Qatar



	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	1.31K	1.40K	7%	Jan-Apr Total	3.96K	4.81K	21%
Oct-Dec avg	0.79K	1.14K	45%				



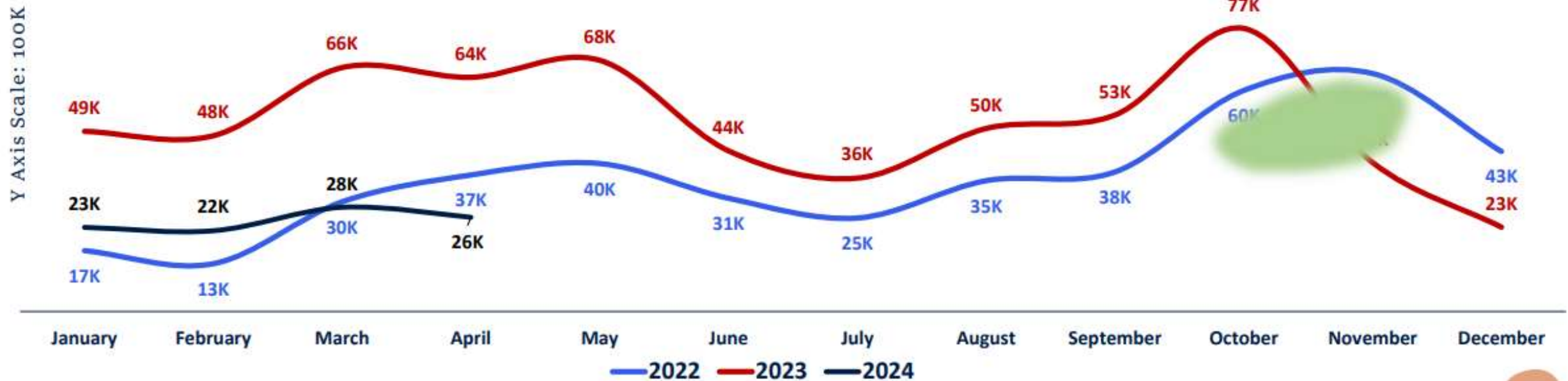
- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')
- Includes Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Kuwait, & Oman.



# Overnight Arrivals

## Europe

	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	29.5K	53.0K	80%	Jan-Apr Total	226.4K	98.6K	-56%
Oct-Dec avg	56.0K	46.7K	-17%				



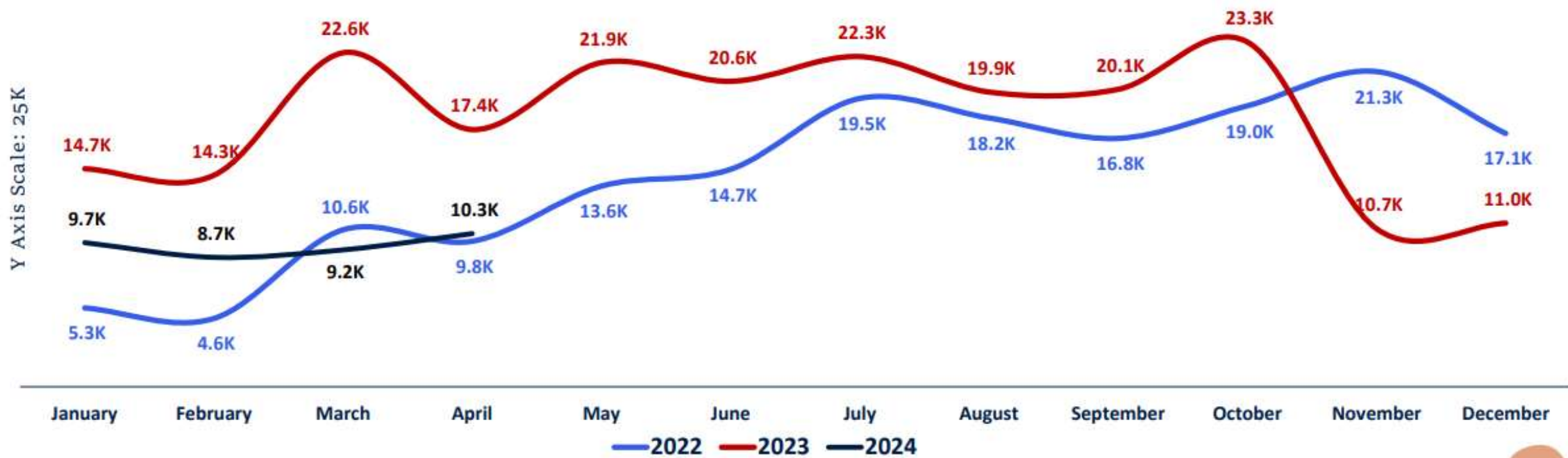
- Source: MOTA
- Overnight Tourists ONLY
- 13 • Average refers to P2Y overnight arrivals (22', 23')



# Overnight Arrivals

## North America

	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	12.6K	19.3K	54%	Jan-Apr Total	68.9K	38.0K	-45%
Oct-Dec avg	19.1K	15.0K	-22%				



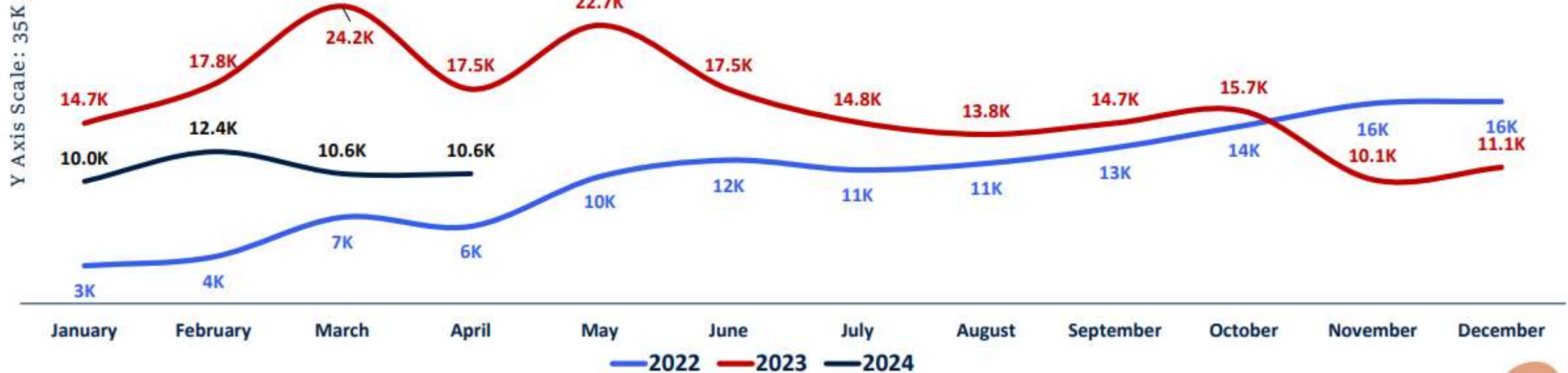
- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')





# Overnight Arrivals Asia

	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	9K	18K	104%	Jan-Apr Total	74.2K	43.5K	-41%
Oct-Dec avg	16K	12K	-22%				



- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')
- 15 • Excludes Arab Countries, Israel, Philippines, Bangladesh, Pakistan, & Sri Lanka



# Overnight Arrivals South America

	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	1.5K	2.0K	+38%	Jan-Apr Total	7.23K	2.63K	+64%
Oct-Dec avg	2.7K	1.3K	-50%				



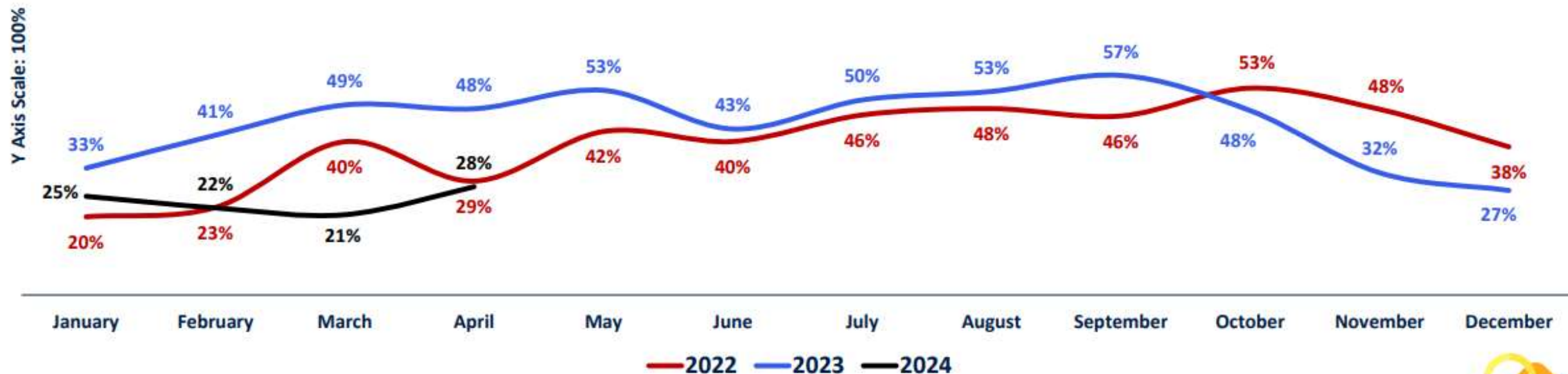
- Source: MOTA
- Overnight Tourists ONLY
- Average refers to P2Y overnight arrivals (22', 23')



# Average Hotel Occupancy

Jordan has about 30K existing hotel rooms.

2024 OCCUPANCY RATES BY REGION				
MONTH/ GOVERNORATES	JANUARY	FEBRUARY	MARCH	APRIL
Amman	31%	39%	31%	36%
Dead Sea	18%	29%	30%	42%
Petra	9%	9%	12%	18%
Madaba	18%	18%	16%	26%
Others Governorates	13%	19%	15%	22%

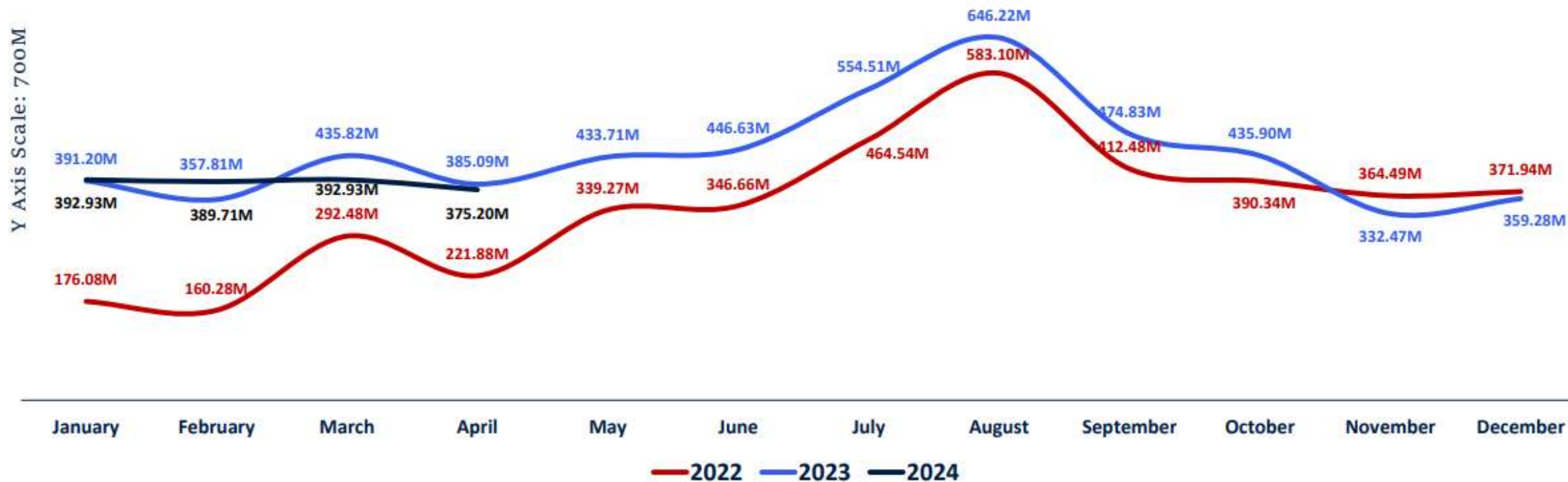


# Receipts (JOD)

## Zoning in on Jordan



	2022	2023	% Change		2023	2024	% Change
Jan-Sep avg	332.98M	458.42M	38%	Jan-Apr Total	1.57B	1.55B	-1%
Oct-Dec avg	375.59M	375.88M	0%				





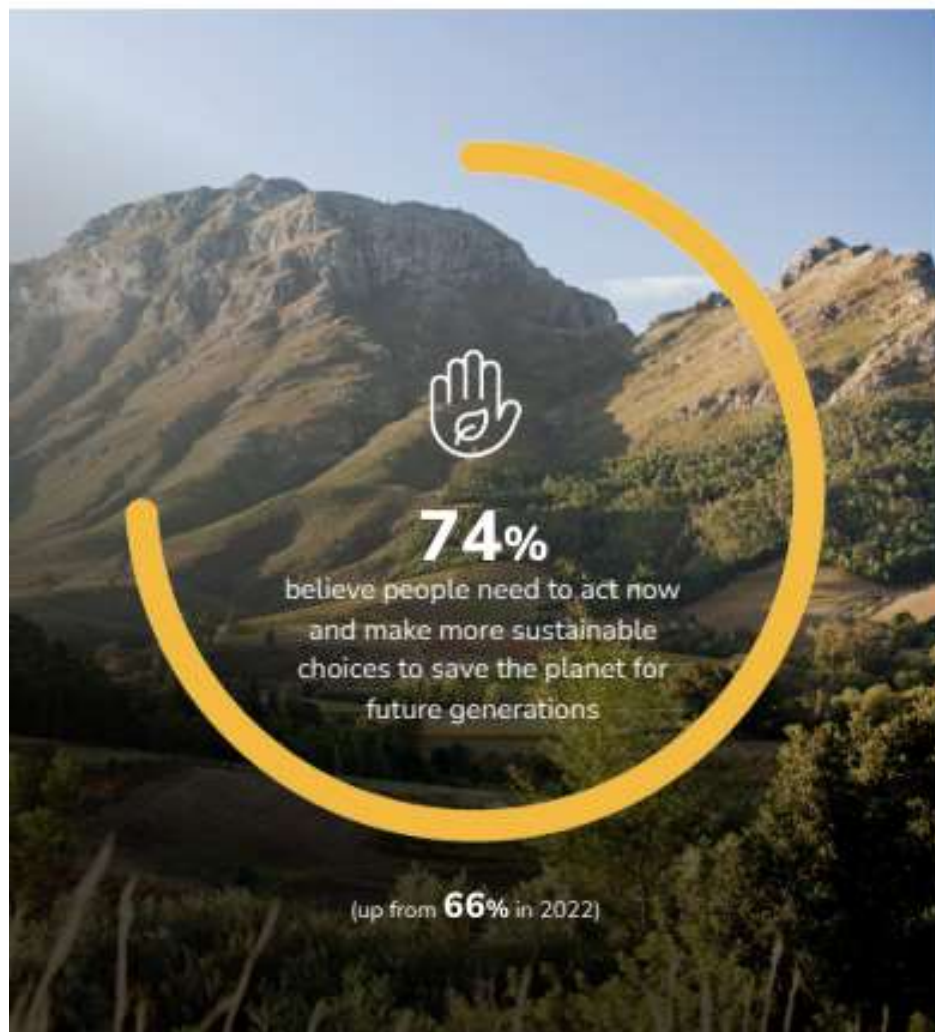
# **Resilient Markets with Sustainability Outlook**



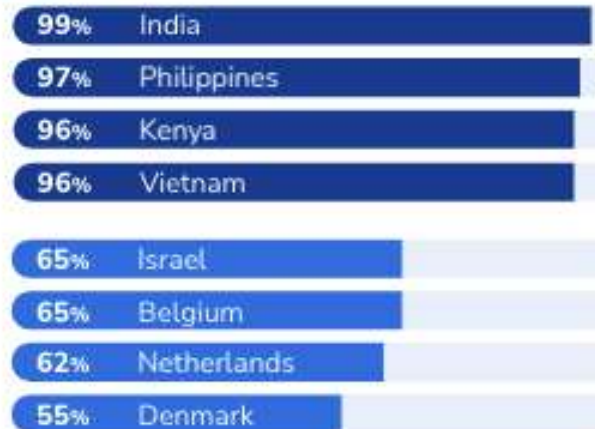
## Sustainability Outlook - Demand

**Booking.com**

33,000 travelers across  
35 countries and territories



### 4 Highest



### 4 Lowest



## Sustainability Outlook - Willingness

Booking.com

**49%**

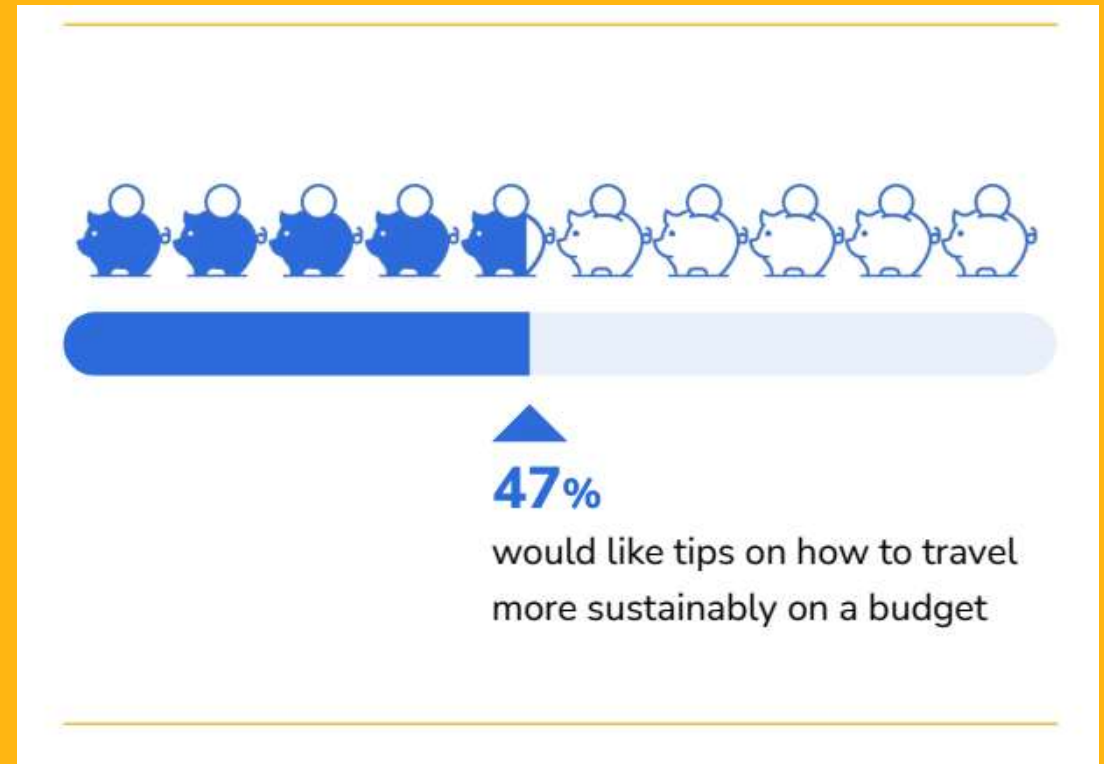
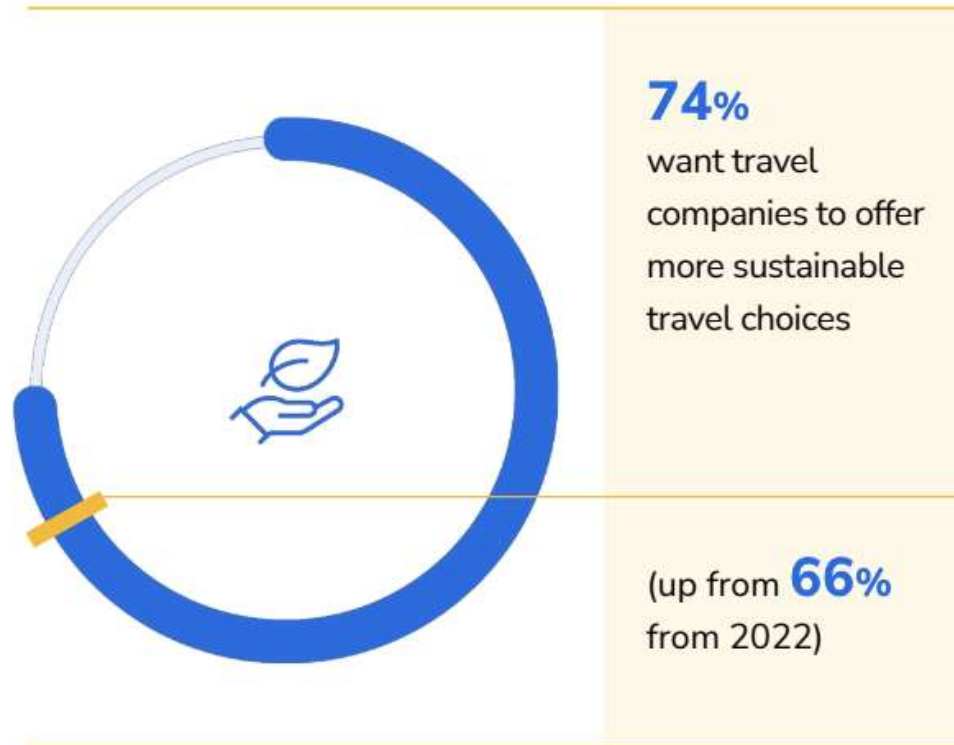
believe more sustainable travel options are too expensive

**43%**

would be willing to pay more for travel options



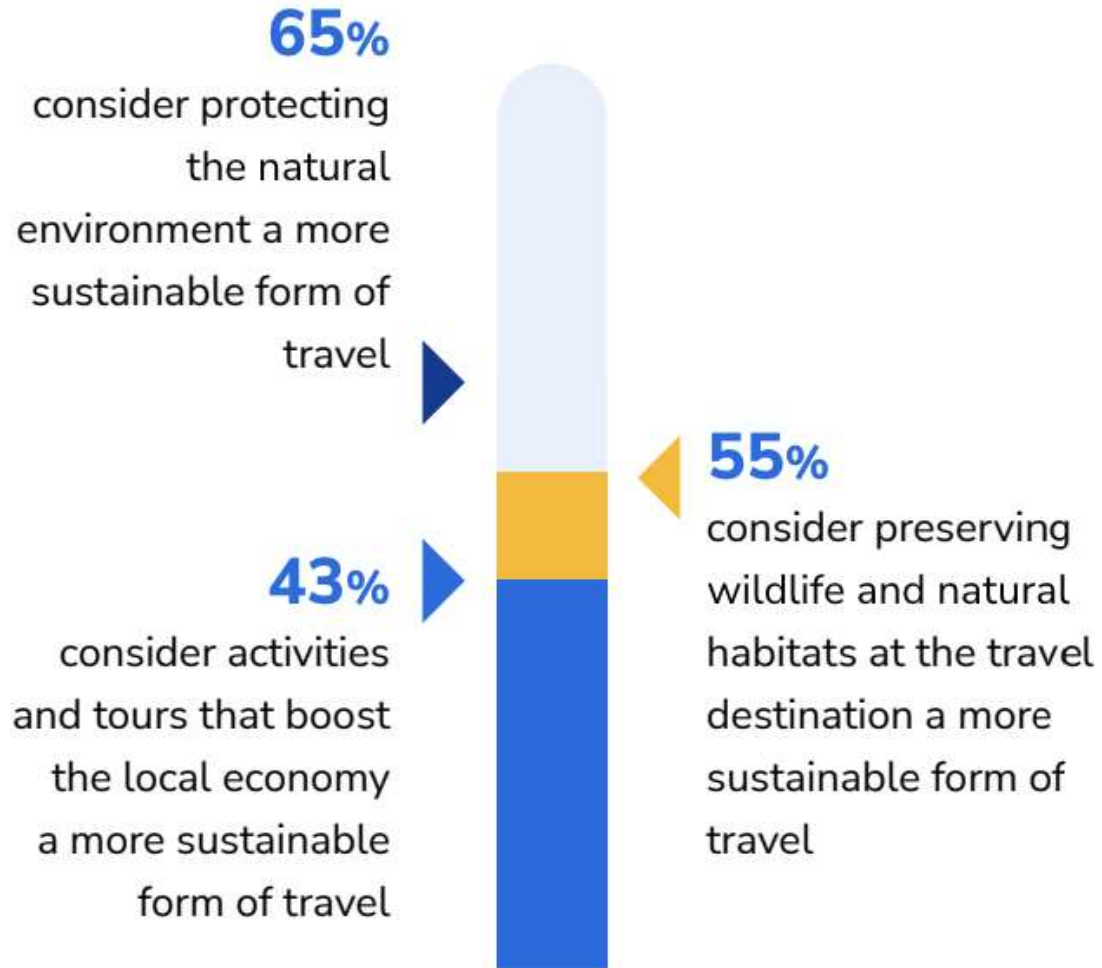
# The Opportunity







# Considerations



**Booking.com**



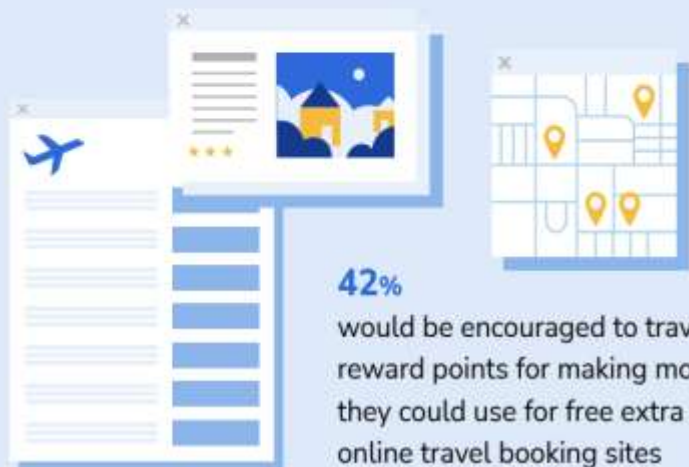
# Motivators

With an increasing number of travelers feeling the pinch, they are seeking more sustainable travel options rich in rewards, with the need for incentivization:

**49%**  
want discounts and economic incentives to opt for eco-friendly options



(up **12%** from 2022)



**42%**  
would be encouraged to travel more sustainably with reward points for making more sustainable choices that they could use for free extra perks or discounts through online travel booking sites



**Booking.com**



# Attitude Towards Seasonality and Overcrowding

## 2023



## 2022





## Attitude towards sustainable accommodation



**65%**

would feel better about staying in a particular accommodation if they knew it had a sustainable certification or label



**59%**

want to filter their options for those with a sustainable certification next time they book



**69%**

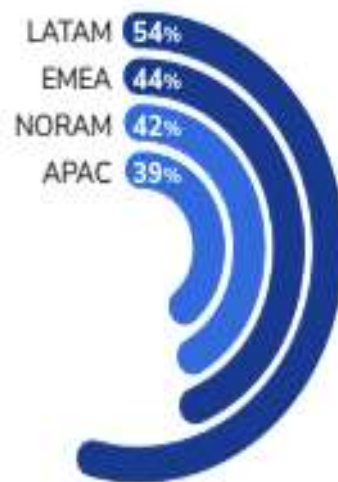
are interested to learn more about why specific options are recognized as more sustainable



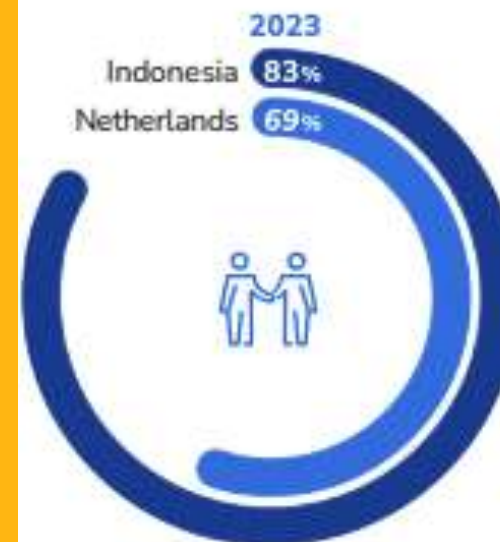
## Attitude towards connection to culture and local communities

### Buying Local

There is also consensus amongst travelers on adopting the 'buy local' mantra on vacation and using their currency as a force for good:



**43%**  
favored small,  
independent stores



**69%**  
want the money  
they spend when  
traveling to go  
back to the local  
community



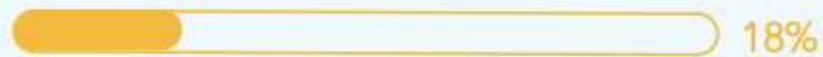
# Attitude to sustainable Transportation

## 2022

When it comes to future trips and the actions travelers are willing to take...



say they want to use more environmentally friendly modes of transport (i.e. walking, cycling or public transport over taxis or rental cars)



would pay more to make sure their rental car is electric

31% 

say sustainability efforts don't play a strong role in their transport choices but it can influence their final choice

23% 

say that sustainability efforts play no role in their choice of transportation, but knowing that the transport option booked follows sustainability best practices makes them feel good

## 2023

Transportation



Highest



Lowest



## Attitude Towards Shopping

2023 Global Travel Trends Report

### Shopping & Dining

- **83%** shop at small businesses when they travel to a new location.
- **69%** would spend more during a vacation if they knew it supported the local community
- **88%** agreed that dining and shopping at local small businesses bring a more authentic experience.

### Local culture and community support

- **85%** want to visit a place where they can truly experience the local culture
- **78%** of respondents are “very” or “somewhat” interested in going on a vacation in 2023 that supports local communities
- **58%** of respondents said that they value learning about different cultures while on vacation



## Attitude Towards Shopping

2023 Global Travel Trends Report

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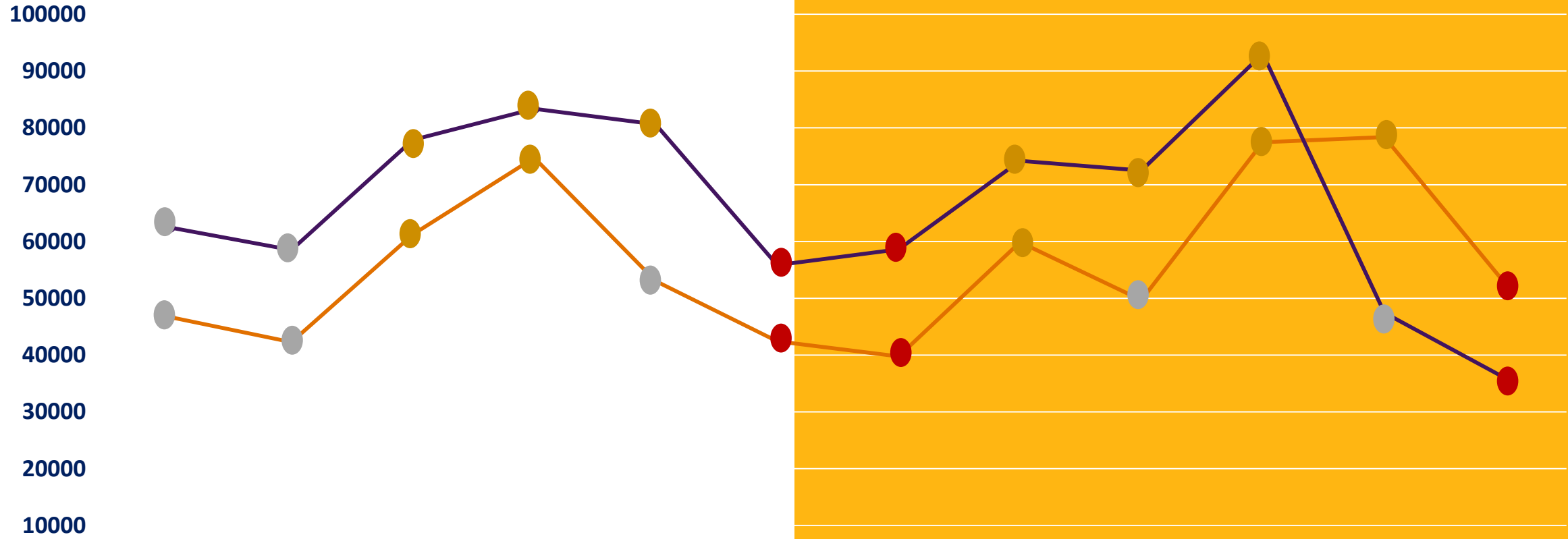
# **LET'S TALK SEASONALITY!**

**When is our Low Season?**

**When is our High Season?**

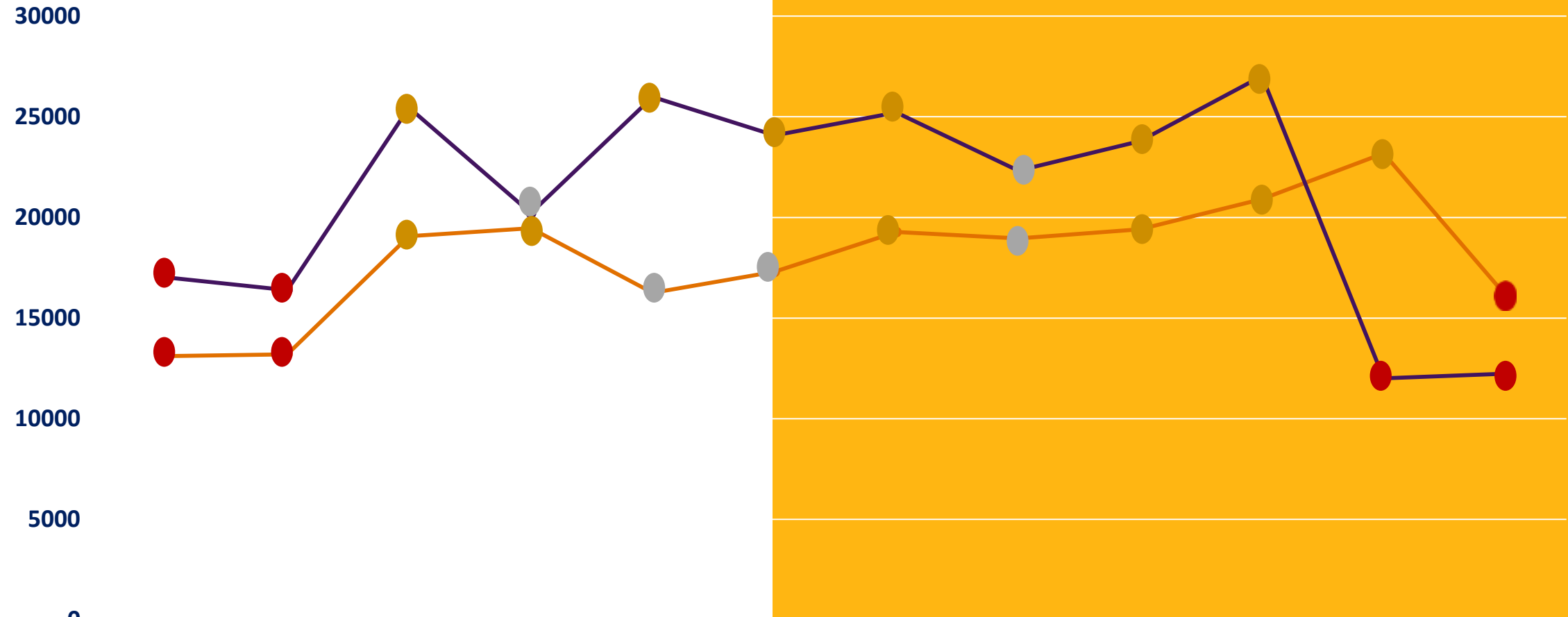
**Do we have a Shoulder Season?**

# Seasonality... How does UK & EU arrivals look like for Jordan on monthly basis? (2019 / 2023 figures)



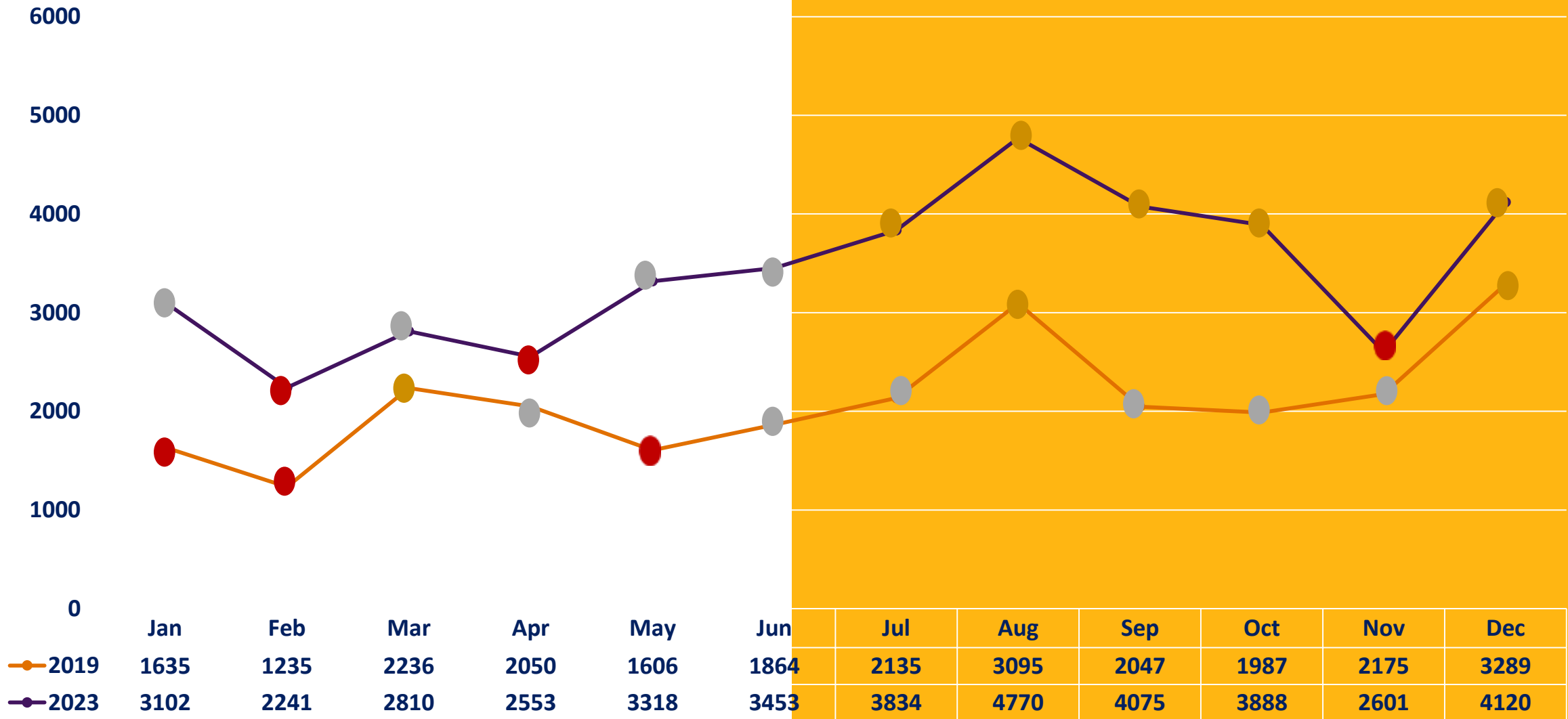
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	46683	42288	61259	74741	53030	42434	39780	59867	49675	77451	78377	52471
2023	62448	58491	77871	83375	80623	55845	58629	74217	72482	93058	47448	35908

# Seasonality... How does Americans arrivals look like for Jordan on monthly basis? (2019 / 2023 figures)

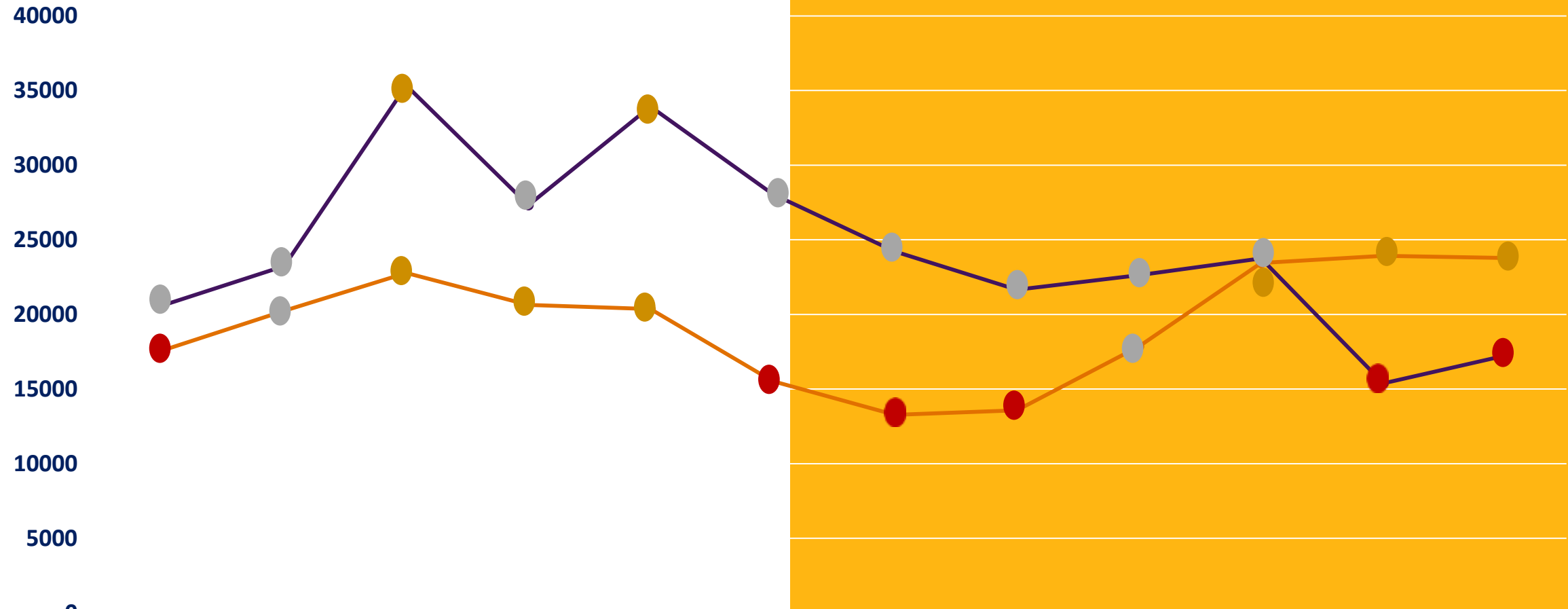


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	13113	13204	19074	19468	16256	17304	19278	18960	19410	20913	23181	16134
2023	17031	16392	25460	20216	25984	24081	25211	22328	23796	27024	12014	12237

# Seasonality... How does African arrivals look like for Jordan on monthly basis? (2019 / 2023 figures)

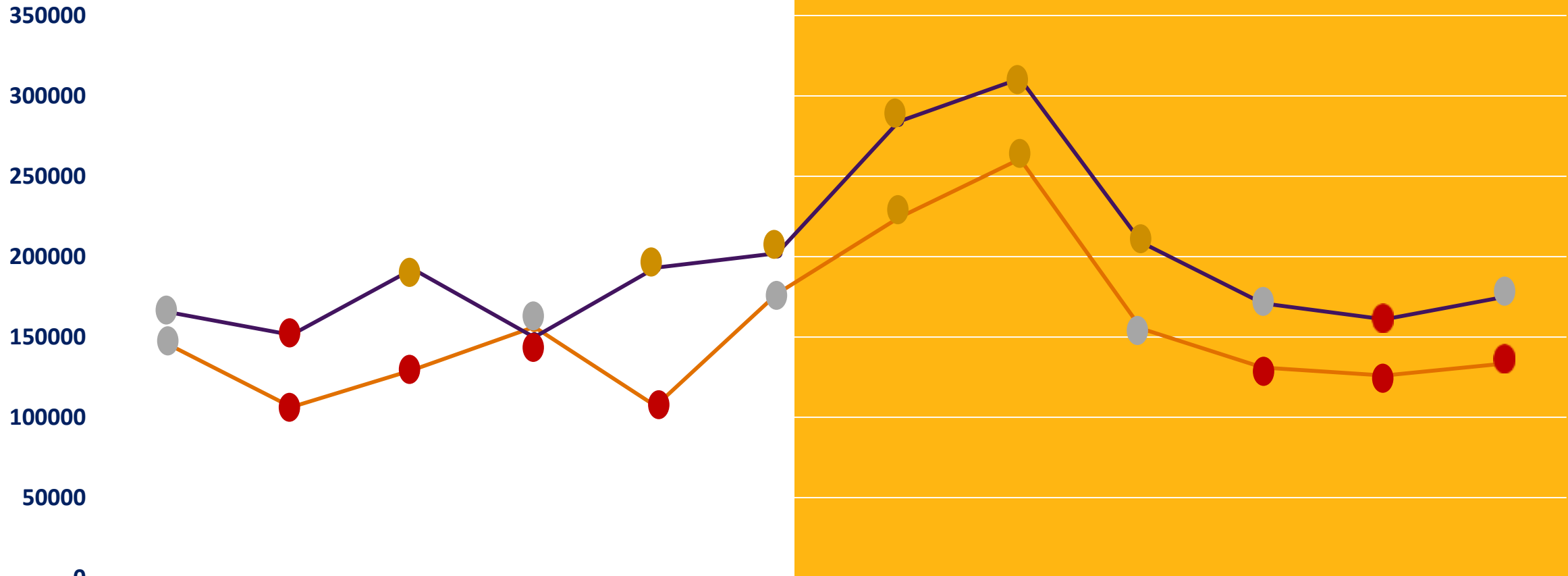


# Seasonality... How does Asian arrivals look like for Jordan on monthly basis? (2019 / 2023 figures)



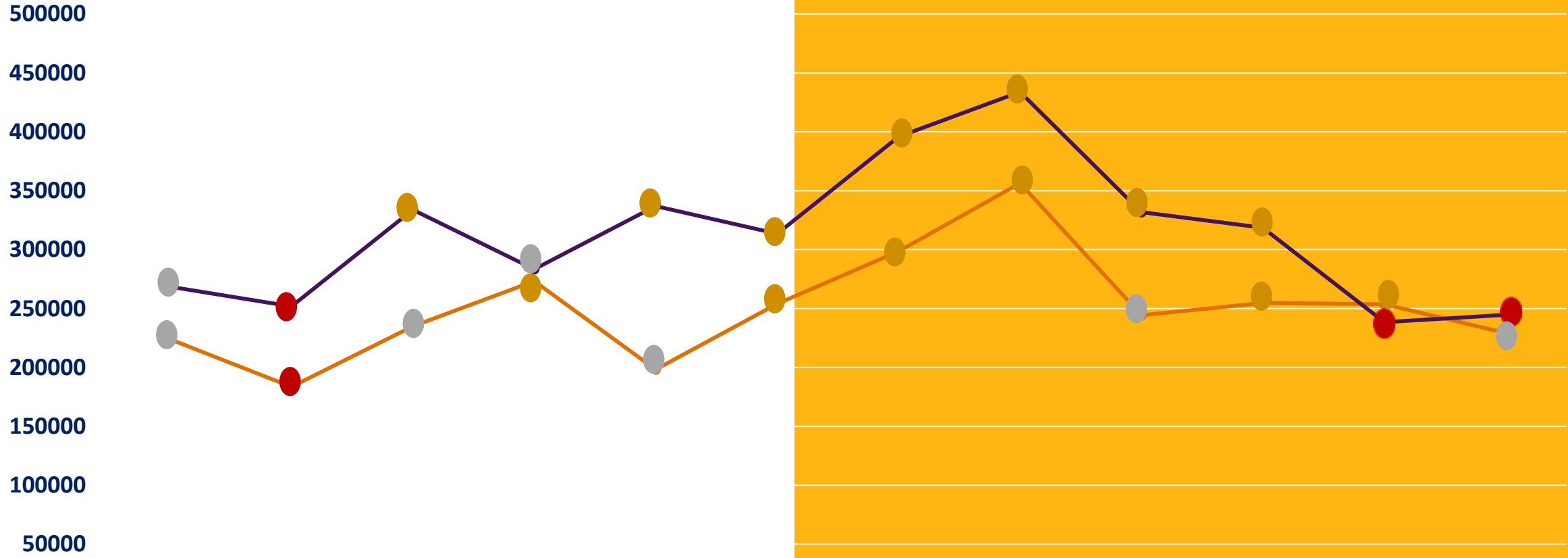
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	17579	20244	22774	20637	20369	15532	13274	13585	17859	23448	23929	23785
2023	20603	23246	35339	27318	33934	28058	24227	21656	22628	23752	15392	17253

# Seasonality... How does Arab arrivals look like for Jordan on monthly basis? (2019 / 2023 figures)



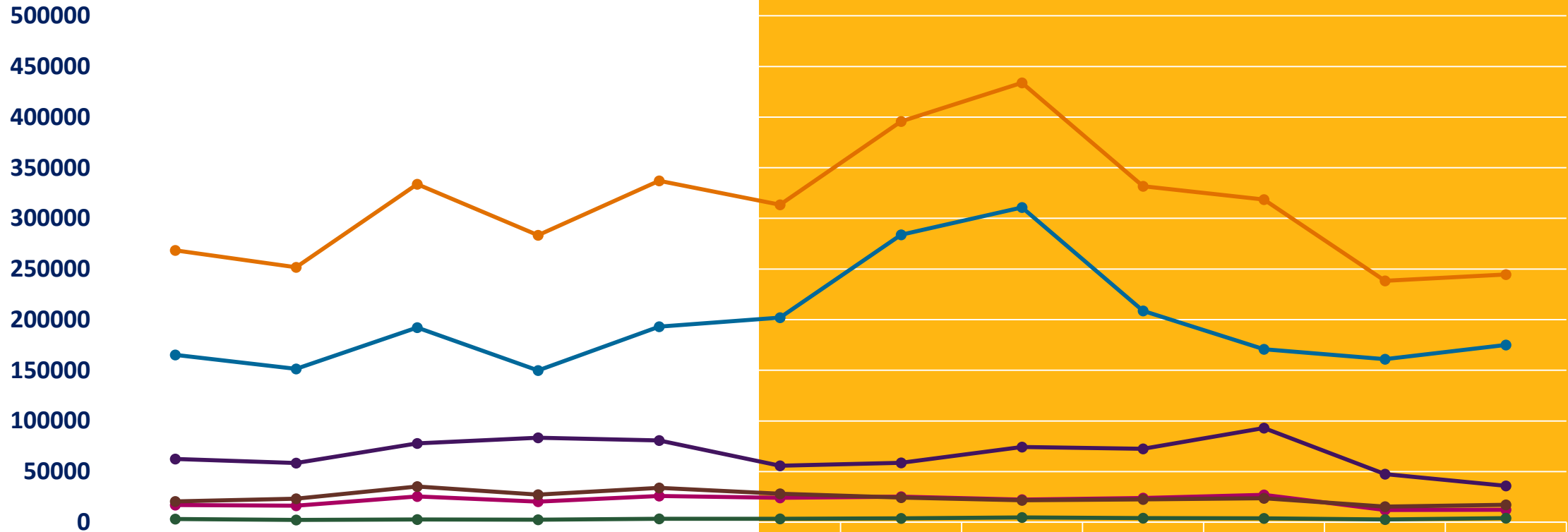
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	144897	106358	129513	156315	107000	176922	224095	260794	155193	130965	126033	133482
2023	165281	151336	192237	149823	193136	202065	283934	310793	208796	170887	160934	175135

# Seasonality... How do all markets arrivals look like for Jordan on monthly basis? (2019 / 2023 figures)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	223908	183509	234893	273213	198263	254058	298564	356303	244185	254766	253697	229162
2023	268466	251708	333720	283286	336998	313503	395837	433766	331711	318611	238392	244655

# Seasonality... 2023



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All Markets	268466	251708	333720	283286	336998	313503	395837	433766	331711	318611	238392	244655
Europe	62448	58491	77871	83375	80623	55845	58629	74217	72482	93058	47448	35908
Arab	165281	151336	192237	149823	193136	202065	283934	310793	208796	170887	160934	175135
America	17031	16392	25460	20216	25984	24081	25211	22328	23796	27024	12014	12237
Asia	20603	23246	35339	27318	33934	28058	24227	21656	22628	23752	15392	17253
Africa	3102	2241	2810	2553	3318	3453	3834	4770	4075	3888	2601	4120





# Lets think together.....



2019	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Europe	S	S	H	H	S	L	L	H	S	H	H	L
Americans	L	L	H	H	S	S	H	S	H	H	H	L
Africa	L	L	H	S	L	S	S	H	S	S	S	H
Asia	L	S	H	H	H	L	L	L	S	H	L	L
Arab	S	L	L	S	L	S	H	H	S	L	L	L
All Markets	S	L	S	H	S	H	H	H	S	H	H	S

2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Europe	S	L	H	H	H	L	L	H	H	H	S	L
Americans	L	L	H	S	H	H	H	S	H	H	L	L
Africa	S	L	S	L	S	S	H	H	H	H	L	H
Asia	S	S	H	S	H	S	S	S	S	S	L	L
Arab	S	L	H	L	H	H	H	H	H	S	L	S
All Markets	S	L	H	S	H	H	H	H	H	H	L	L

- > Group 1: European market in low season
- > Group 2: Arab families & FITs
- > Group 3: Arab-based corporate market

- > Decide which month you are targeting
- > Develop an itinerary (agree # of nights and program)
- > How would you reach out to new customers?



**FOOD FOR THOUGHT!**

# Let's think together!



**Egypt ranked the second most popular foreign destination for Russian tourists in early August with 345,700 trips, and the UAE third with 345,400 trips in till August 2023**

**Many Germans Travel to Hurgadah & Sharm during Summer for diving and sun**

**37'000 Brits live in Cyprus**

**Jordan received 36'442 arrivals from Poland in 2023. Today we have 3'508?**

**What programs do we have to complement the up-coming product in Saudi Arabia?**

**What about the Corporate Sector in the GCC and Egypt?**

**What about the Coptic Market in Egypt? And the Christians in Lebanon?**



# **RESILIENT MARKETS**

**Which markets we should focus  
more on?**

## Saudi Arabia



- Outbound tourism in the first half of 2023 recorded a 37 percent increase in number of tourists
- Spending also increasing by 74 percent compared the first half of 2022.
- Outbound **non-Saudi** residents represented 45 percent of all outbound tourists in the first half of 2023, increasing by 24 percent compared to the first half of 2022
- Visiting friends and relatives was the top purpose of visits representing 67 percent of all **non-Saudi outbound** tourist trips
- Average length of stay increasing from 19.3 nights in the first half of 2022 to 45.5 nights in the first half of 2023
- Saudi outbound tourists recorded an increase of 49 percent mostly to neighbouring countries, whereas Saudi outbound tourism spending increased by 32 percent compared to the first half of 2022.



**+34.1%**  
over 2023

## Saudi Arabia Quick Facts

### Population

**36.41** Million  
**25-54 years 18** Million  
**55-64 years 3** Million



### Av Age

**30.6** Years  
**50.8%** Males  
**49.2%** Females

### % of Expats to total population

**30%**

### Purpose of Visit

- VFR
- Leisure (Holiday)
- Business (MICE)
- Medical
- Education

### Top Destinations

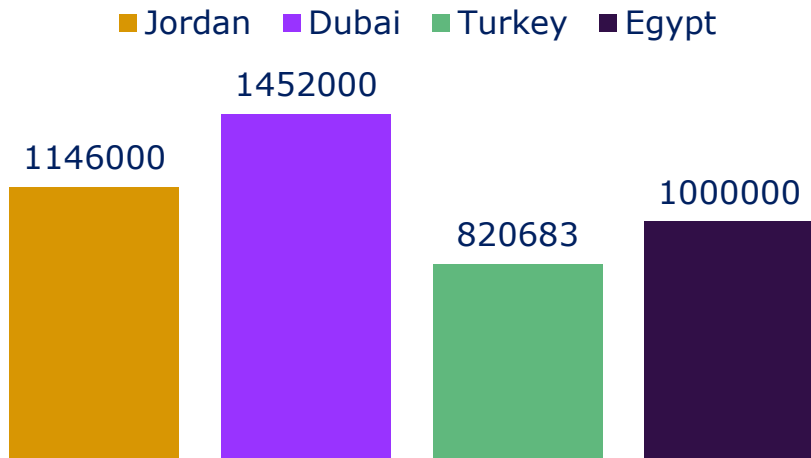
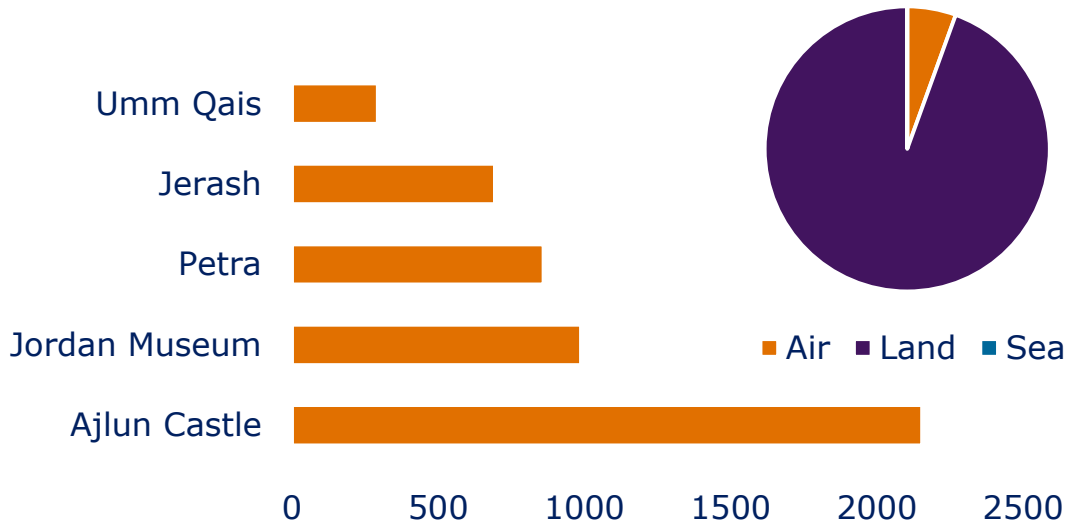
- Kuwait
- UAE
- Bahrain
- Egypt
- Jordan
- Turkey
- UK
- Austria
- USA

### Population by City

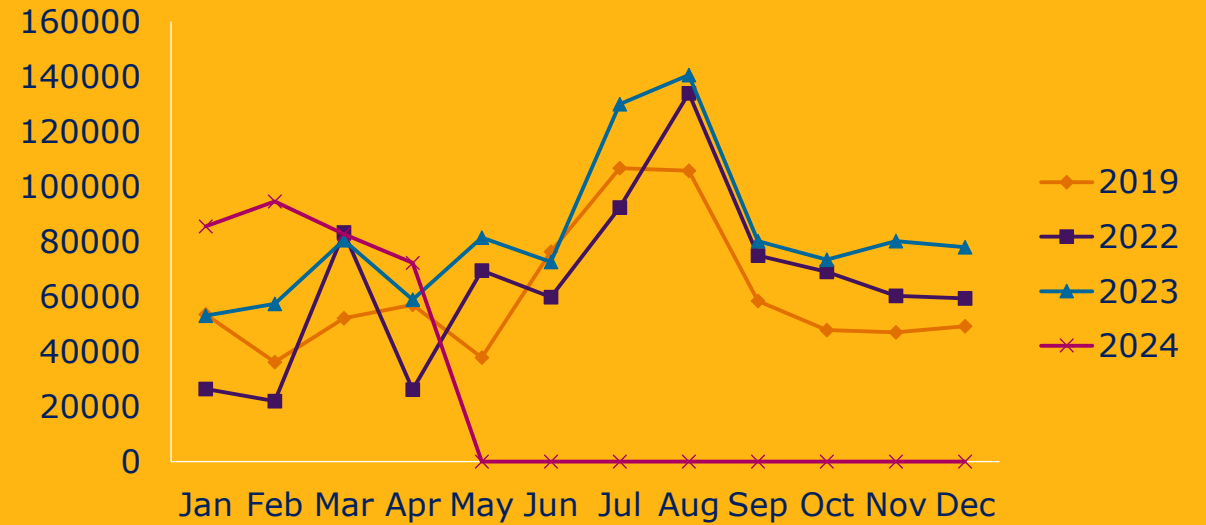
- Riyadh 7.8 Million
- Jeddah 5 Million
- Mecca 2.1 Million
- Madina 1.6 Million
- Dammam 1.3 Million



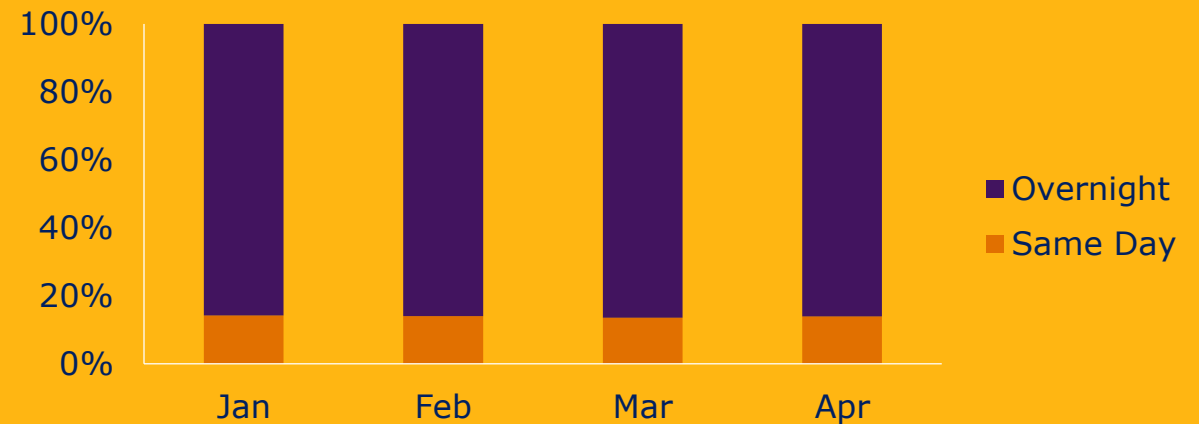
## Saudi Arabia



## When do they travel to Jordan?



## Same Day / Overnight (Jan – Apr 2024)



# Saudi Arabia & Digital



## Facebook

- 10.75 Million users in 2023
- 78% were Males and 22% were Females

## YouTube

- 29.1 Million users in 2023
- 60.1% were Males and 39.9% were Females

## Instagram

- 12.45 Million users in 2023
- 57.9% were Males and 42.1% were Females

## Snapchat

- 21.15 Million users in 2023
- 52% were Males and 48.1% were Females

## TikTok

- 26.39 Million users in 2023
- 65.8% were Males and 48% were Females



# Saudi Arabia Quick Facts

## Major TOs

- Almosafer.
- Arjaa Travel & Tourism.
- Dadabhai Travel.
- Dulaiman Travel.
- Zahid Travel.
- Zamil Travel.

## Where they stay?

**38% Hotels**  
**62% Furnished  
Apartments**

## How do they book?

With younger generations,  
Online booking is becoming  
more in practice, yet bookings  
through travel agencies still  
dominate

## Airlines Flying to Jordan from Saudi

- Royal Jordanian
- Saudi Airlines
- Fly Nas
  
- 42 Flights per week from Riyadh
- 49 Fights per week from Jeddah
- 12 Flights per week from Madinah
- 15 Flights from Dammam



# Kuwait



- Outbound tourism from Kuwait has become an almost unwavering annual ritual for most families in Kuwait, with some making two or more leisure trips abroad each year.
- Outbound travel from Kuwait is not dominated by any single destination, but intraregional travel is a noticeable trend. In the case of Kuwait, six of the ten most popular destinations are located in Middle East.
- They prefer to stay at apartments

## Airlines Flying to Jordan from Kuwait

- Royal Jordanian      Daily Flights (7 flights a week)
- Kuwait Airlines      Daily Flights (7 flights a week)
- Al Jazeera      12 Flights weekly
- Jordan Aviation      2 Flights weekly

## Major Tour Operators in Kuwait

- Al Ghanim
- Al Mulla Travel
- Badur Travel



**-1.6%**  
over 2023

## Kuwait Quick Facts

### Population

**4.82** Million  
**1.53** Million Kuwaitis  
**30%** are Shia



### Av Age

**39.8** Years  
**60.8%** Males  
**39.2%** Females



### % of Expats to total population

**60%**

### Purpose of Visit

- Leisure (Holiday)
- VFR
- Business (MICE)
- Medical
- Education

### Top Destinations in the area...

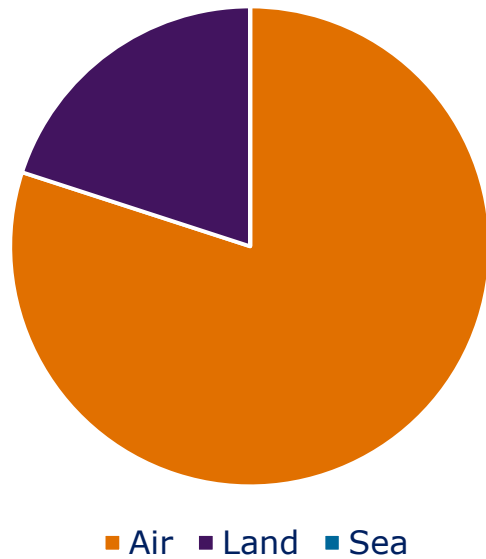
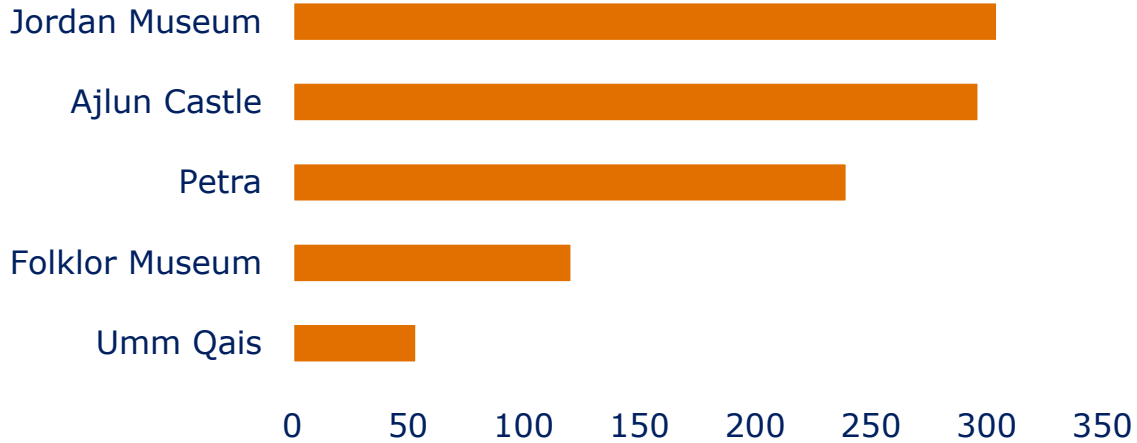
- Saudi Arabia
- Turkey
- UAE
- Bahrain
- Egypt
- Jordan
- Iran
- Georgia

### Population by City

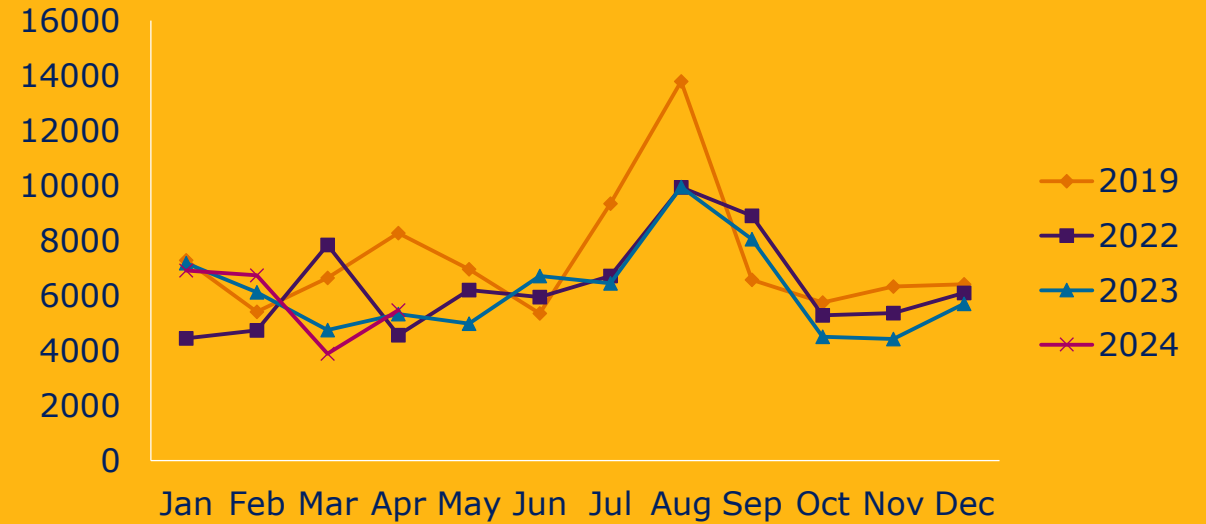
- Al Ahmadi 650K
- Hawalli 165K
- Al Salmiyah 145K
- Sabah Al Salim 140K



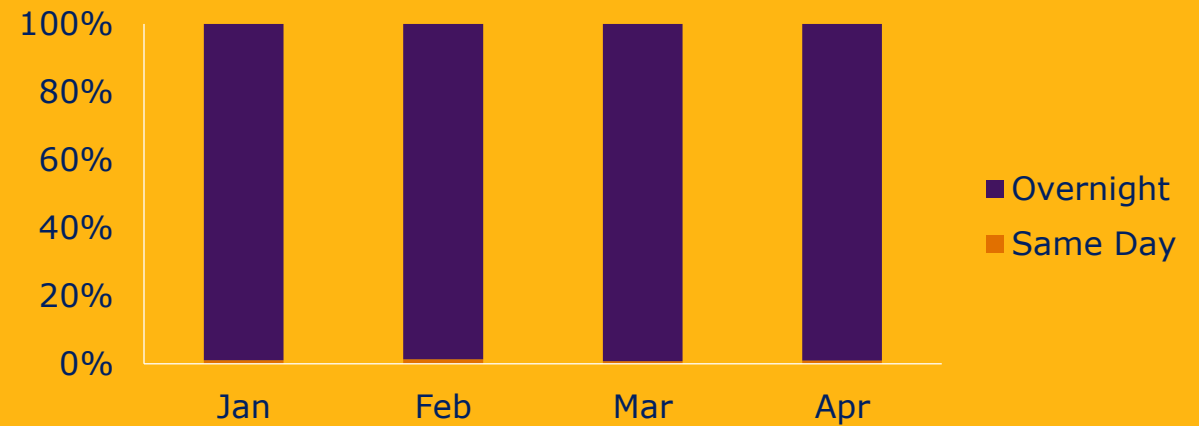
# Kuwait



## When do they travel to Jordan?



## Same Day / Overnight (Jan – Apr 2024)



## Kuwait & Digital



### Facebook

- 2.4 Million users in 2024 so far
- 68% were Males and 32% were Females

### YouTube

- 3.46 Million users in 2024 so far
- 62.5% were Males and 37.5% were Females

### Instagram

- 2.8 Million users in 2024 so far
- 59.3% were Males and 40.7% were Females

### Snapchat

- 2.7 Million users in 2024 so far
- 51.7% were Males and 47.3% were Females

### TikTok

- 4.15 Million users in 2024 so far
- 53.1% were Males and 46.9% were Females



## Kuwait Quick Facts

### Top Destinations for Kuwaitis in Europe...

- UK
- France
- Spain
- Germany
- Italy
- Czech

# United Arab Emirates



- 68% prefer eco friendly travel
- 61% prefer independent traveling over packaged tours
- 40% are willing to pay more to enjoy flexy travel and change plans
- They usually take 2 leisure trips per year
- Friends & Family influence their decision on their next travel destination, followed by reviews and SEO
- 33% are interested in doing adventure while traveling

## Airlines Flying to Jordan from UAE

- |                     |                        |
|---------------------|------------------------|
| • Royal Jordanian   | 18 Flights weekly      |
| • Emirates Airlines | 11 Flights weekly      |
| • Fly Dubai         | 10 Flights weekly      |
| • Etihad            | 7 Flights weekly       |
| • Air Arabia        | 14 Flights weekly      |
| • Jordan Aviation   | 2 flights weekly       |
| • Wizz Air          | 2 flights weekly       |
| • Wizz Air          | 2 flights weekly Aqaba |



**+22.8%**  
over 2023

## UAE Quick Facts

### Population

12 Million

15-54 years 83%



### Av Age

33.5 Years

68% Males



32% Females

### % of Expats to total population

88.5%

### Purpose of Visit

- Leisure (Holiday)
- Business (MICE)
- VFR
- Education
- Medical

### Top Destinations

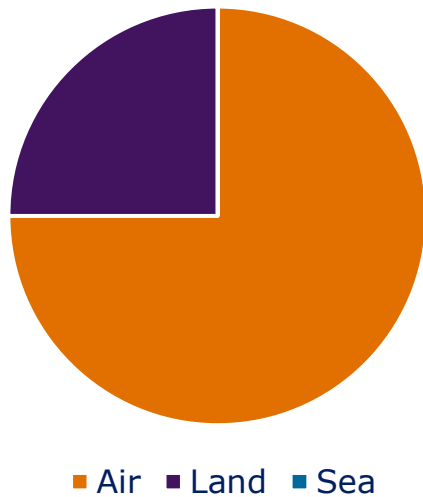
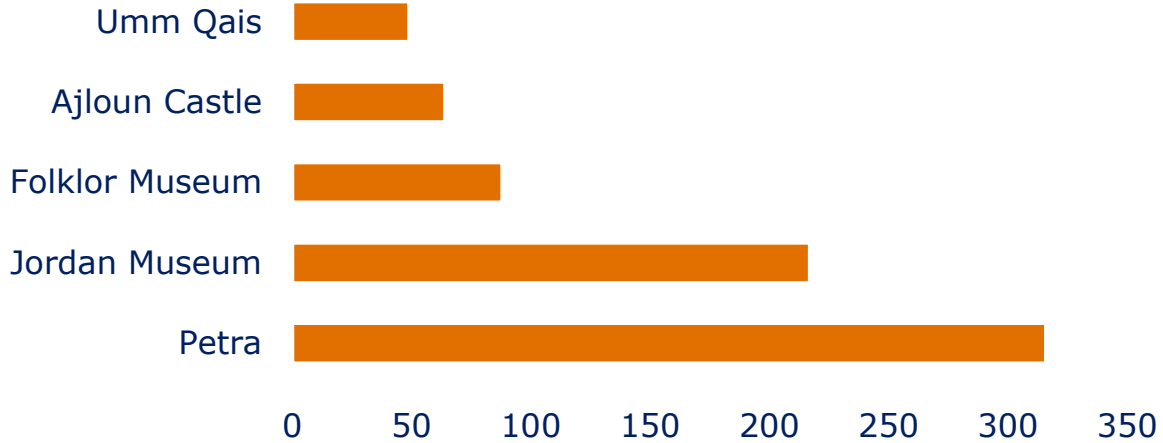
- Saudi Arabia
- UK
- Turkey
- Austria
- Spain
- Oman
- USA
- Germany
- Thailand

### Population by City

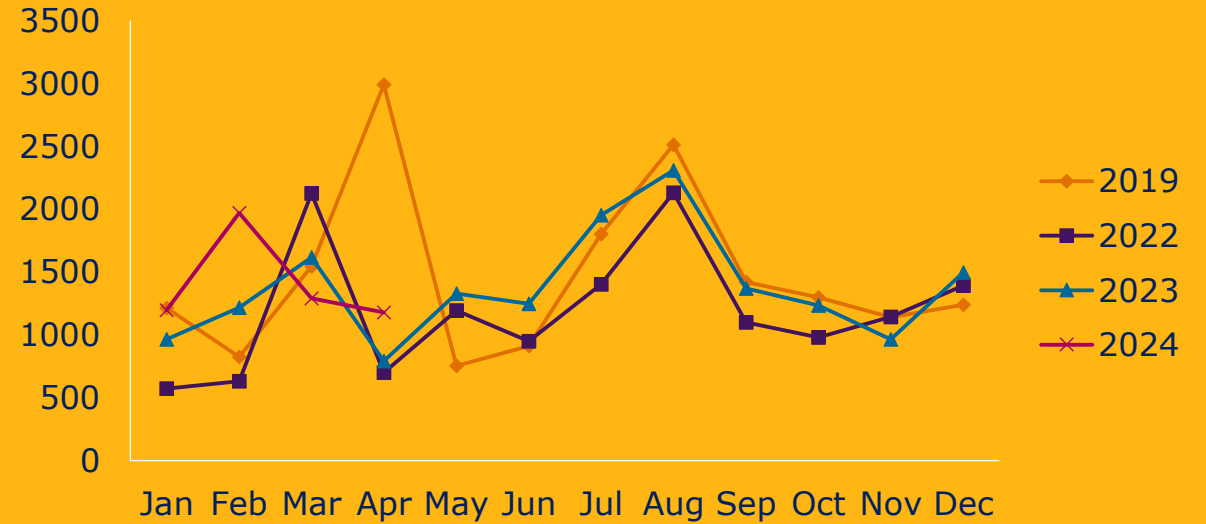
- Dubai 3.5 million
- Abu Dhabi 1.5 million
- Sharjah 1.4 million
- Al Ain 408K
- Ajman 226K



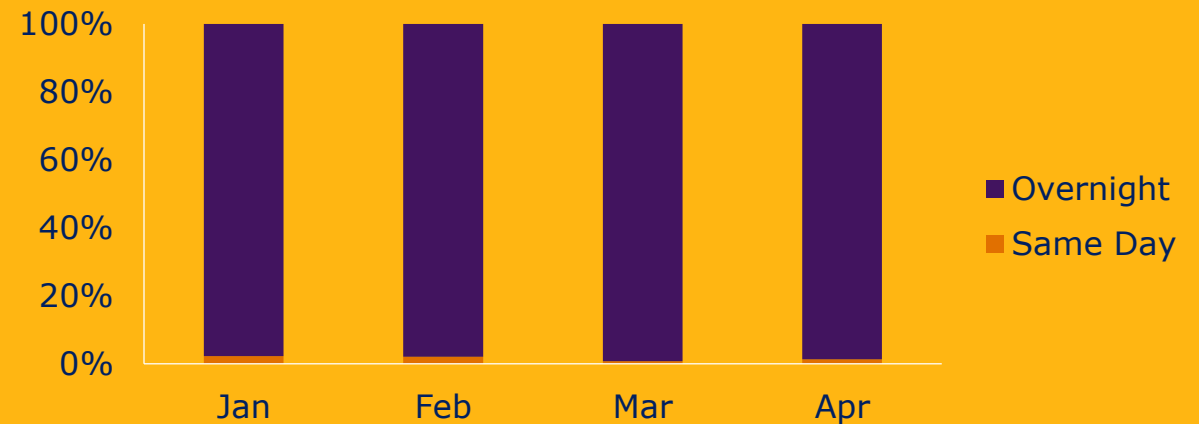
# UAE



## When do they travel to Jordan?



## Same Day / Overnight (Jan – Mar 2024)



## UAE & Digital



### Facebook

- 9.1 Million users in 2023
- 73.2% were Males and 26.8% were Females

### YouTube

- 8.8 Million users in 2023
- 71.8% were Males and 28.2% were Females

### Instagram

- 7 Million users in 2023
- 63.5% were Males and 36.5% were Females

### Snapchat

- 4.5 Million users in 2023
- 60% were Males and 40% were Females

### TikTok

- 10.7 Million users in 2023
- 60% were Males and 40% were Females



## UAE Quick Facts

### Major TOs

- Holiday Factory
- Al Rais
- Emirates Holidays
- Musafir
- Dnata Holidays

# Qatar



- Qatar residents' spending on tourism and travel abroad increased by 34.5% in 2023
- Qatar is classified among the list of countries that export tourism and spend the most on tourism abroad.
- Qatar, a unique market, is considered to be one of the best outbound market for luxury travel in the GCC and Middle East region. Qatar remains one of the most competitive and powerful economies in the region. Therefore, a majority of Qatari tourists and travellers are looking for luxury travel experience.



**+21.3%**  
over 2023

## Qatar Quick Facts

### Population

**2.73** Million  
**16-64 years 88%**

### Av Age

**34.2** Years  
**72.2% Males**  
**27.8% Females**

### % of Expats to total population

**89.5%**

### Purpose of Visit

- Leisure (Holiday)
- VFR
- Business (MICE)
- Medical
- Education

### Top Destinations

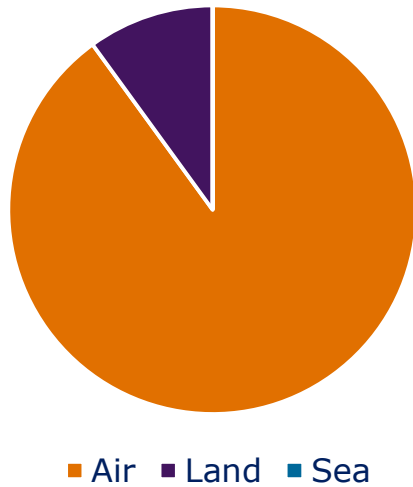
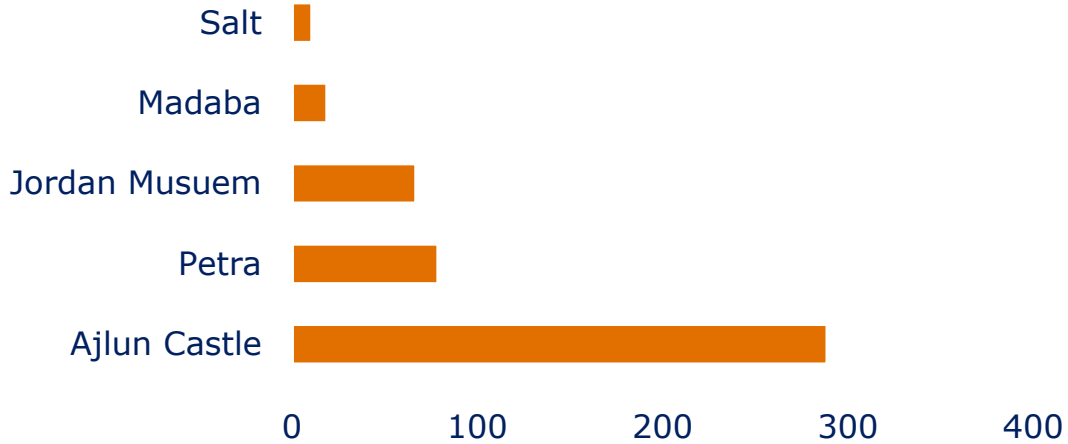
- Saudi Arabia
- UAE
- UK
- France
- Switzerland
- Spain
- Turkey
- Thailand
- USA
- Georgia

### Population by City

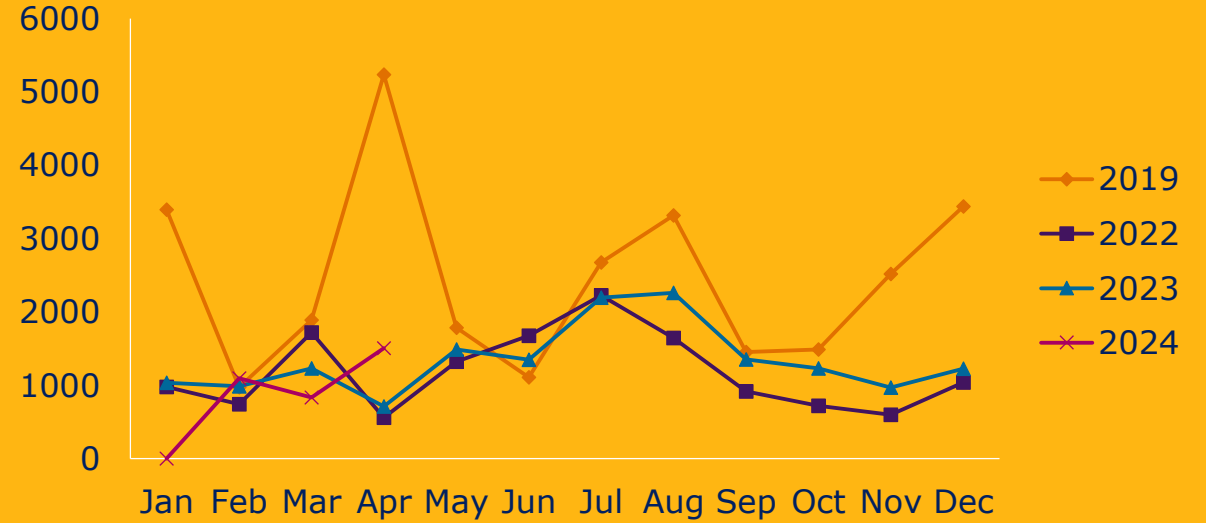
- Doha 1.7 million
- Al Rayyan 250K
- Lusail 250K
- Al Wakra 90K



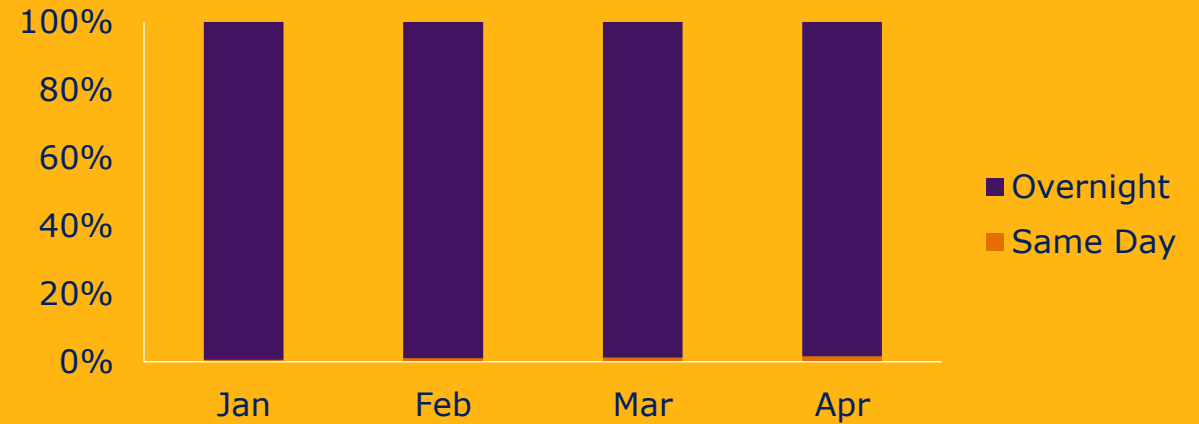
# Qatar



## When do they travel to Jordan?



## Same Day / Overnight (Jan – Mar 2024)





# Qatar & Digital



## Facebook

- 2.4 Million users in 2024 so far
- 75% were Males and 25% were Females

## YouTube

- 2.57 Million users in 2024 so far
- 77.8% were Males and 22.2% were Females

## Instagram

- 1.6 Million users in 2024 so far
- 64.1% were Males and 35.9% were Females

## Snapchat

- 2.7 Million users in 2024 so far
- 51.7% were Males and 47.3% were Females

## TikTok

- 2.6 Million users in 2024 so far
- 61.6% were Males and 38.4% were Females



# Qatar Quick Facts

## Major TOs

- Arabian Adventures
- Ali Bin Ali
- Cleopetra
- Manaai Travel

## Where they stay?

**78% Hotels**  
**22% Furnished  
Apartments**

## How do they book?

With younger generations,  
Online booking is becoming  
more in practice

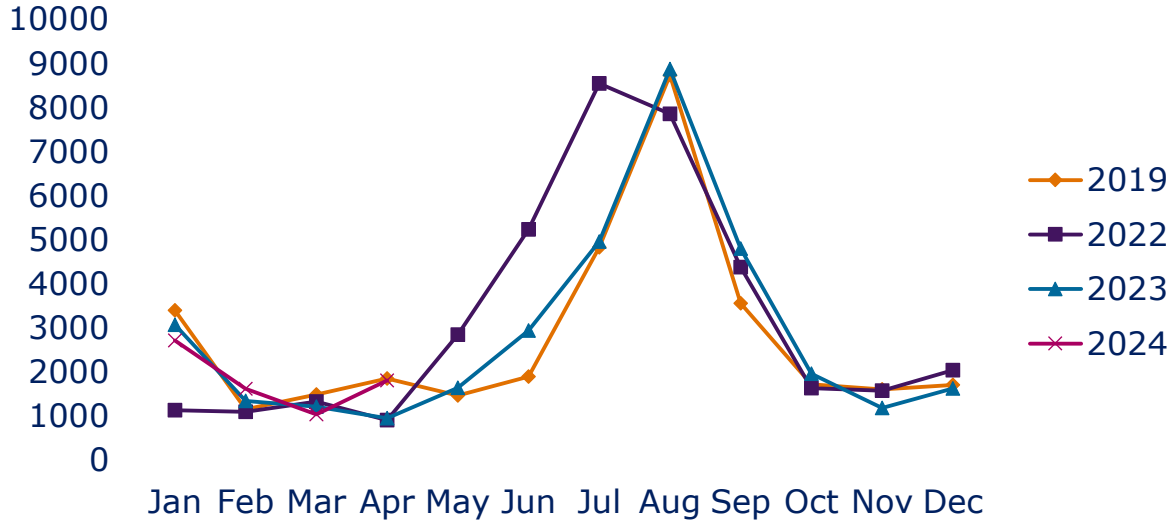
## Airlines Flying to Jordan from Qatar

- |                   |                   |
|-------------------|-------------------|
| • Royal Jordanian | 12 flights weekly |
| • Qatar Airways   | 21 flights weekly |

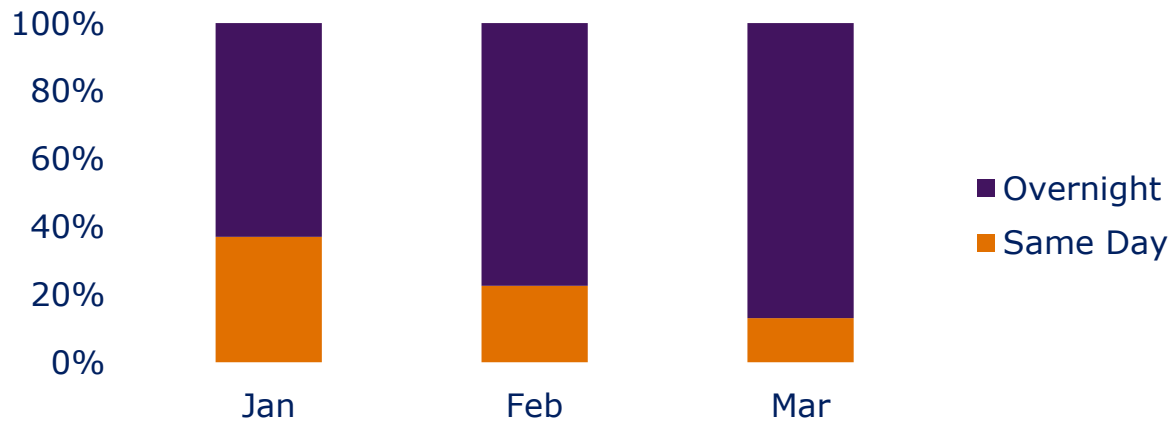
# Bahrain



## When do they travel to Jordan?



## Same Day / Overnight (Jan – Mar 2024)



**+9.4%**  
over 2023

## Bahrain Quick Facts

### Population

1.5 Million

### Av Age

33.8 Years  
31.8 Males  
38.2 Females

### % of Expats to total population

54%

### Purpose of Visit

- Leisure (Holiday)
- VFR
- Business (MICE)
- Medical
- Education

### Top Destinations

- Saudi Arabia
- Kuwait
- Qatar
- Turkey
- Iran
- Egypt
- UK
- UAE
- Jordan

### Population by City

- Manama 436K
- Riffa 195K
- Muharraq 173K

# Bahrain & Digital



## Facebook

- 795K users in 2024
- 73.5% were Males and 26.5% were Females

## YouTube

- 1.45 Million users in 2024
- 66.8% were Males and 33.2% were Females

## Instagram

- 1.1 Million users in 2024
- 59.3% were Males and 40.7% were Females

## Snapchat

- 1.04 Million users in 2023
- 54% were Males and 46% were Females

## TikTok

- 1.18 Million users in 2023
- 53.6% were Males and 46.4% were Females



# Bahrain Quick Facts

## Major TOs

- Viator
- Tour Dragon
- Bahrain Int'l Travel Services

## Where they stay?

**62% Hotels**  
**38% Furnished Apartments**

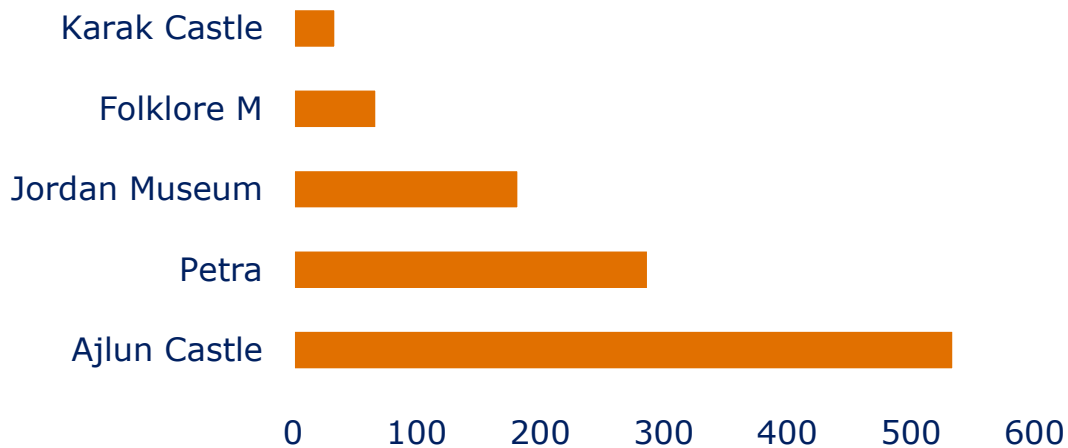
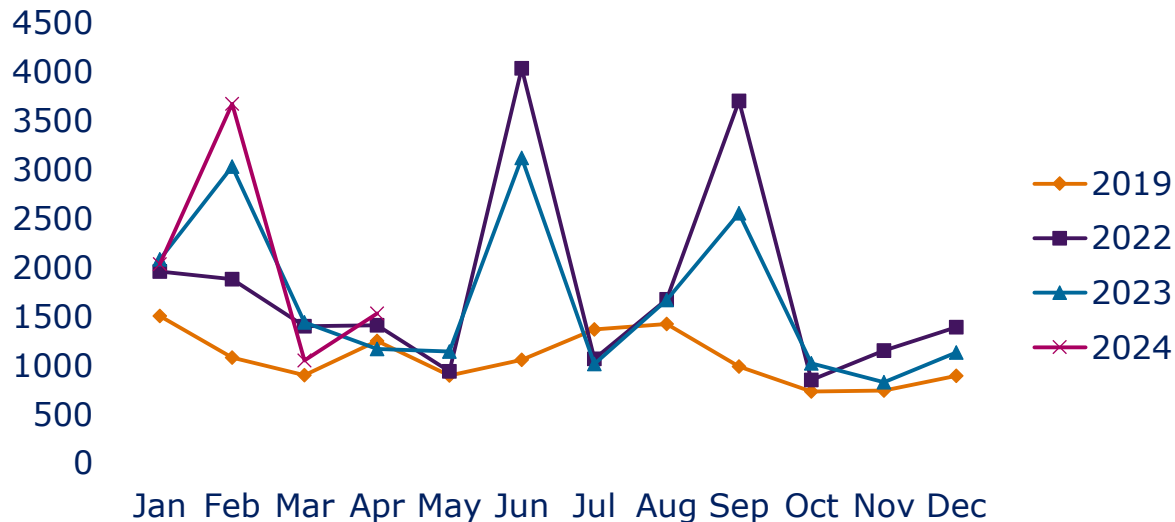
## Airlines Flying to Jordan from Bahrain

- Royal Jordanian      3 Flights weekly
- Gulf Air                10 Flights weekly



# Oman

## When do they travel to Jordan?



**+7.3%**  
over 2023

## Oman Quick Facts

**Population**  
4.7 Million  
51.7% are between 25 and 54 years old

**Av Age**  
29.3 Years  
60.6 Males  
39.4 Females

**% of Expats to total population**  
40.8%

### Purpose of Visit

- Leisure (Holiday)
- VFR
- Business (MICE)
- Education
- Medical

### Top Destinations

- UAE
- Saudi Arabia
- Qatar
- India
- Turkey
- Iran
- Kuwait
- Azerbaijan
- Jordan

### Population by City

- Muscat 797K
- Seeb 237K
- Salala 163K
- Bawshar 159K

# Oman & Digital



## Facebook

- 1.7 Million users in 2024
- 77.3% were Males and 22.7% were Females

## YouTube

- 3.97 Million users in 2024
- 68.8% were Males and 31.2% were Females

## Instagram

- 2.4 Million users in 2024
- 60.9% were Males and 36.5% were Females

## Snapchat

- 1.91 Million users in 2024
- 53.5% were Males and 45.4% were Females

## TikTok

- 1.94 Million users in 2024
- 60.4% were Males and 39.6% were Females



# Oman Quick Facts

## Major TOs

- My Wings
- Fayeda Travel
- Bahwan Tours

## Where they stay?

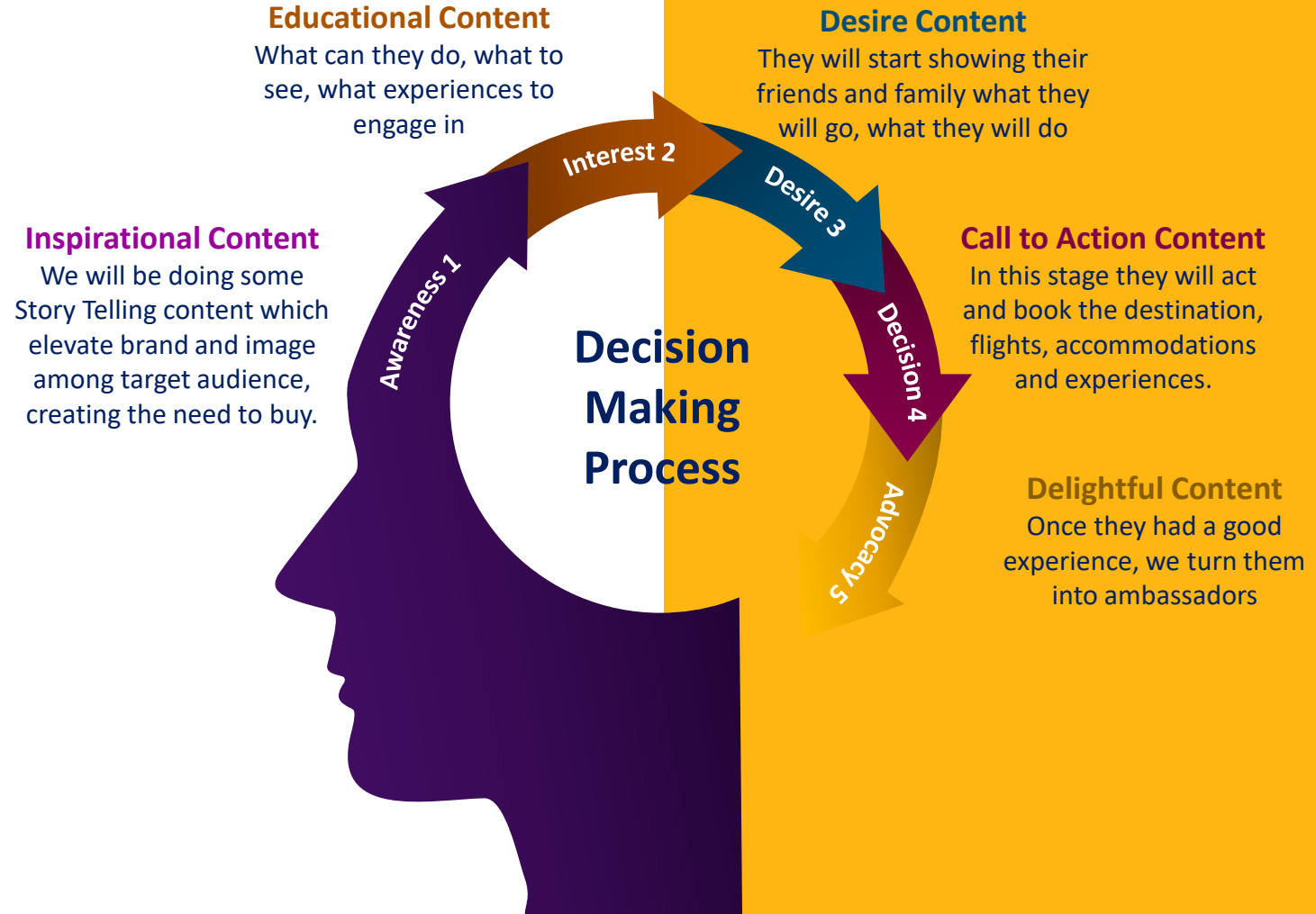
**42% Hotels**  
**58% Furnished Apartments**

## Airlines Flying to Jordan from Oman

- Oman Air                      7 Flights weekly

# Deciding on a destination

## The Decision Making Process





**EXTEND THEIR STAY!**



## How can we extend the stay of our visitors? What can we do to make them want to stay longer?

- **Create Compelling Experiences:** Offer unique and diverse experiences that encourage tourists to stay longer. This could include events, adventure activities, culinary tours, historical tours, and eco-tourism adventures.
- **Promote Extended Stay Packages:** Develop attractive packages and deals that incentivize tourists to extend their stay. This could include discounted rates for longer stays, inclusive activities, or added amenities for guests who stay for a certain duration.
- **Highlight Hidden Gems:** Showcase lesser-known attractions and hidden gems within the destination. Encourage tourists to explore beyond the main tourist spots and discover the local culture, traditions, and natural beauty of the area.





# Characteristics of a long stay traveler

It is **difficult** to indicate variables positively or negatively correlated with Length of stay.



Income and budget  
Older tourists' age  
Nature-based tourism  
German Tourists



Price and cost  
urban-based tourism  
UK tourists (*more often during the year but for shorter periods*)  
Dutch tourists (*but not to Italy, Portugal...etc.*)

It is challenging to generalize gender trends  
culture-based tourism has no impact



## Potential Length of Stay

+ 7 Days

**+70%**

41%

7-13 days

22%

14-20 days

8%

21 days +

## How do they Travel?

61%

As a couple

11%

As a family

## Top Three Preferred Accommodation

61%

Small  
Hotels/motels

51%

Private  
Rentals

50%

B&Bs/inns

48%

Large hotel  
chains

Visitors from further away are more  
likely to stay longer



## TOP INTERESTS AND ACTIVITIES

Historical sites and tours

Closeness to the ocean and beach access

Self-driving tours

Nature and outdoor activities

Arts and cultural experiences

Food take-out options and/or having a pub or fine dining on-site at their accommodation



# Mechanisms for Extending Length of Stay

What does AI suggest?

1. Keep tourists engaged by displaying an **online calendar**
2. Highlight the **unique local attractions**, events, and businesses
3. **Host festivals** and special events that celebrate your location's culture and history
4. Provide easy-to-follow **maps and directions** to help tourists find attractions and navigate the area
5. Offer **free tours** or events to give tourists a taste of what the destination has to offer
6. Provide **discounted tickets** for attractions or bundled deals



# Mechanisms For extending Length of Stay

What Do you suggest?

Analyze the Tourism Value Chain and suggest mechanisms...



Maps and Directions	???	???	???	Hiking	???	Free Tours
???	???	???	???	???	???	???



**MARKET MIX TO BE  
CONSIDERED...**

**Let's think a bit, out of the box!**



- **Expat Community in the GCC**
- **Expat Community in Cyprus**
- **Educational Institutes and Universities, Schools included**
- **Corporate offices with regional existence in GCC, Turkey & Egypt**
- **Diplomatic Missions in the Region**
- **Social and Community Clubs in the Region**
- **Banks**
- **Arab & International Organizations**
- **UN Agencies**
- **Offers for Airlines (Cabin Crew)**

Are Just a Few to Mention!  
Thank you...