USAID
FROM THE AMERICAN PEOPLE

Building Economic Sustainability Through Tourism Project

Providing Industry with Tourism Data to Support Tourism Resilience: Recovery Planning from COVID-19

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USAID Building Economic Sustainability Through Tourism Project

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ACRONYMS

DOS	Department of Statistics
GDP	Gross Domestic Product
JTB	Jordan Tourism Board
MOTA	Ministry of Tourism and Antiquities
TDGVA	Tourism Direct Gross Value Added
TSA	Tourism Satellite Account
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
VFR	Visiting Friends and Relatives

EXECUTIVE SUMMARY

1. The COVID-19 pandemic is providing all sectors of the global economy with a serious challenge, however those countries that rely on tourism as a mainstay in their economies are likely to be hardest hit. With borders closed around the world, airlines grounding aircraft, and serious outbreaks of the virus in many of the key international tourist source markets, the tourism sector in Jordan is facing significant difficulties.

2. The objective of this study was to develop a model for projecting visitor arrivals and expenditure to Jordan (and beyond) over the period 2020-2030. The findings were then used to estimate tourism direct gross value added (TDGVA) and employment in 2020 and apply various different scenarios to the model to identify best and worst cases for visitor arrivals, expenditure, TDGVA and employment.

3. The core structure of the *Jordan Forecaster Model* is based on origin-destination pairs. This means that it analyses the number of international tourist arrivals to destinations according to the origin countries (where they have travelled from). By building the model in this way it can be more responsive to specific conditions in both the origin markets and the countries that tourists visit (the destinations), this is critical in the current situation of a global pandemic.

4. There were 4.5 million international tourist arrivals to Jordan 2019, however these are projected to decline to 1.8 million in 2020, before bouncing back to 3.5 million in 2021. Unlike global tourism arrivals (which will recover slower), it is anticipated that Jordan will exceed the number of arrivals that travelled to the country in 2019 by 2022.

5. Inbound tourists spent US$5.8 billion in Jordan in 2019, however an expected US$2.4 billion is projected in 2020, a fall of just over 58%. 94% growth is expected in 2021 generating a projected US$4.7 billion. The model estimates that expenditure will exceed 2019 levels by 2022.

6. In 2020, tourism direct gross value added (TDGVA) is estimated to be US$1.1 billion. This compares to US$2.5 billion in 2019, down by over 55%.

7. Whilst jobs created by tourism in Jordan were estimated to be almost 97,000 in 2019, these are projected to fall to around 52,500 in 2020, down 46% or around 44,500 fewer jobs required. Of course the actual change in employment may not be this high due to job retention schemes and other policies put in place by businesses to retain staff over what is expected to be a relatively short term drop in demand.

8. These figures are based on the *expected case* scenario, however the four other (better and worse case) scenarios have been tested using the *Jordan Forecaster Model*. These indicate that the best case could mean that Jordan experiences 2.5 million tourist arrivals in 2020, spending US$3.3 billion, generating TDGVA of US$1.6 billion, and requiring almost 61,000 jobs. The worst-case scenario could mean that there would be only 0.9 million arrivals, spending US$1.1 billion, generating TDGVA of US$0.5 billion, and requiring just over 40,000 jobs.

9. Whilst these are extraordinary times for the travel and tourism sector, there is light at the end of the tunnel. Resumption of travel will depend on medical advances and their speed of implementation. However, countries will recover at variable speeds, and as long as the virus persists, even in isolated geographical pockets, caution will play a significant role in the choice of destinations people visit, the type of tourism products they buy, and the experiences they participate in. Those destinations are able to provide the greatest levels of confidence amongst potential travellers are the ones that will recover the fastest.

1. INTRODUCTION

The COVID-19 pandemic is providing all sectors of the global economy with a serious challenge, however those countries that rely on tourism as a mainstay in their economies are likely to be hardest hit. With borders closed around the world, airlines grounding aircraft, and serious outbreaks of the virus in many of the key international tourist source markets, the tourism sector in Jordan is facing significant difficulties.

As Jordan faces this global crisis, there is a need to better understand the economic impact of the decline in tourist arrivals, how this is likely to affect the country, and for how long. This research will benefit both public and private sectors, allowing for informed planning, policy making and ultimately marketing as the tourism sector recovers from these setbacks.

The objective of this two-part consultancy study is to:

1. Develop a model for projecting visitor arrivals and expenditure to Jordan, the Middle East and other key destinations and regions worldwide over the period to 2030.

2. Use the model to estimate tourism direct gross value added (TDGVA) in the Jordanian economy and employment using an "expected" base case, and four other scenarios.

The COVID-19 pandemic is still relatively new, only six months ago most people had not heard of the coronavirus, and this particular strain of the virus was only given a name in February 2020. Consequently, whilst the impacts of the virus are being monitored closely by many different organisations, there are still many uncertainties and unknowns regarding how the pandemic will unfold and what its impact on the travel and tourism sector will be.

Consequently, the model that has been developed to allow various external conditions to be fed into it, which are incorporated into the calculations for projecting tourist arrivals and expenditure worldwide, as well as TDGVA and employment. Therefore, it can be re-run as these changes occur over the course of the year, and beyond, generating updated projections.

Note that the model measures international tourist (overnight) arrivals worldwide, and therefore does not include international day visitors. Expenditure figures are for tourist spend in destinations and exclude international transport.

2. THE JORDAN FORECASTER MODEL

2.1 Basic Structure

The core structure of the *Jordan Forecaster Model* is based on origin-destination pairs. This means that it analyses the number of international tourist arrivals to destinations according to the origin countries (where they have travelled from). By building the model in this way it can be more responsive to specific conditions in both the origin markets and the countries that tourists visit (the destinations). For example, tourist flows are influenced by economic conditions in origin countries, the distance and availability of transport between the origin and destination, and in the current situation, travel restrictions that are in place in both the origin and destination. There are of course many other considerations, and these are explained further in this chapter.

The model includes origin-destination pairs for all destinations in the world that received more than 10 million international tourist (overnight visitor) arrivals in 2018, plus Jordan. This is a total of 39 countries, which collectively account for 77% of all international tourist arrivals worldwide.

For each of these 39 destinations, the largest 10 origin markets are specifically identified and included in the model. In the case of Jordan, all origin markets generating more than 10,000 arrivals in 2018 (a total of 37) are included. In total the model includes 422 origin-destination pairs, representing over 60% of all international tourist trips in 2018.

Data is not yet available for most origin-destination pairs for 2019, so arrivals in 2019 (except for Jordan where actual figures are available) have been estimated using the growth rates reported to UNWTO by destinations for the first three quarters of the 2019.

2.2 Projections for 2020

2.2.1 Overview

In terms of visitor movements worldwide, 2020 marks the largest downturn in tourism ever measured, and may ever be measured. Forecasting for 2020 presents a challenge as there are still so many uncertainties. However, the *Jordan Forecaster Model* has been built to allow any future changes in the external environment to be assessed, and new projections to be generated accordingly.

This section explains all the factors that the model takes into consideration for projecting the number of international tourist arrivals globally in 2020.

2.2.2 Lockdown and Travel Restrictions

Lockdown and travel restrictions both in origin and destination countries are having the most significant impact on worldwide travel. These restrictions manifest themselves in various forms, but can essentially be categorised as:

- A.1: Complete or partial closing of borders
- A.2: Suspension of flights – partially or complete
- B.1: Destination specific travel restrictions aimed at passengers from specific countries
- B.2: Quarantine or self-isolation related measures
- B.3: Invalidated visas or cannot be obtained any longer upon arrival
- B.4: Medical certificate required before arrival

The "A" categories are more severe than the "B" categories, and therefore have a greater impact on travel between the origin and destination countries. Of course, it is important to consider the restrictions in both countries when evaluating travel between an origin-destination pair. A destination may be completely open to travellers, but if the origin country is not allowing its residents to travel, no movement between the two countries can take place.

Assessment of the impact of "A" and "B" travel restrictions has led to the assumption that countries operating an "A" class restriction are not allowing any travel inbound or outbound, whilst those with a "B" class restriction are allowing 50% of their usual movements, inbound and outbound. As of 8th May 2020, 88% of all countries worldwide were operating "A" class restrictions.

The model includes a monthly assessment of the level of restriction for every country in the world. In 2020, restriction levels are known for the months of January to April, however for the remaining months of the year the following assumptions have been made:

- May, June and July: all countries awarded the same class restriction as were in place in early May (most countries had "A" class restrictions).
- August and September: all countries awarded the same class restriction as were in place in March (some countries with "A" class restrictions, and many countries with "B" class restrictions).
- October, November and December: all countries awarded "B" class restrictions.

The outcome of lockdowns and travel restrictions in each country, and in particular the main generating and receiving countries (for example Germany, France, Spain, Italy and the United States) will have a significant impact on the overall forecasts of tourist arrivals, as well as corresponding expenditure. Consequently, the monitoring of every country as they emerge from lockdown and various other travel restrictions over the next few months is essential. Adjusting the model depending on how countries open up is a straightforward process but can have significant impacts on travel flows.

2.2.3 COVID Factor

One of the characteristics of the COVID-19 pandemic is how destinations are evaluating the opening of their borders to residents of other countries. From an inbound perspective, some destinations are beginning to discriminate against travellers from certain countries based on their perception of how these countries have handled the health crisis, the number of infections and deaths, and therefore the risk they pose to their intended destinations.

Conversely, destinations that have suffered badly with large numbers of cases and deaths are being perceived by some markets as countries they prefer to avoid in the coming months, possibly due to a perceived risk of catching the virus, or possibly from the negative press the destination has received on news channels.

Consequently, the model takes into consideration the number of COVID related deaths per one million of the population in both the origin and destination countries of a travel pair.

2.2.4 Mode and Distance of Travel

As lockdown and travel restrictions ease, it is expected that domestic tourism will be the first to benefit, initially as residents take day trips, and then as accommodation and food and drink outlets open, for overnight trips, including short and longer breaks. Short haul regional travel between countries that can be undertaken by car is then most likely to resume, with long haul travel taking longer to gain traction.

Consequently, the model takes into account the distance between original-destination pairs, and then applies a travel factor growth rate that favours those pairs that can be connected without travelling by air, and to a lesser extent, can be connected by short haul flights.

2.2.5 Purpose of Visit

Research shows that leisure tourism is expected to resume faster than business tourism as travel restrictions ease. There is strong evidence of pent up demand for leisure travel, whilst business trips are likely to remain for essential travel until confidence amongst travellers increases. Therefore, the size of the leisure travel market at each destination is taken into consideration by the model.

2.2.6 Jordanians Living Overseas

In 2019, there were almost 4.4 million tourist arrivals to Jordan. Of these 33% were Jordanians residing abroad. These tourists require special treatment in the model due to them being significantly more likely to visit Jordan than most other types of visitor due to their family connections, and being more willing to travel due to their familiarity with Jordan; therefore, a factor has been applied to allows for this

2.3 Projections for 2021

Forecasting international tourist trips in 2021 is, in some respects, more difficult than for 2020. The basic assumption is that there will not be any significant second peak of COVID-19 infections, but smaller contained outbreaks in some countries. It is also assumed that a vaccination will not be available during 2021. There will be a significant bounce back in 2021, and the *bounce back rate* is related to the rate of decline of arrivals that has been estimated for 2020.

The growth of the economies of origin countries, as forecast by the IMF in the latest World Economic Outlook (April 2020) is also incorporated in to the projected 2021 growth rates, as are the pre-COVID-19 growth rates of international tourist arrivals in the destination countries.

2.4 Projections for 2022

By 2022 it is assumed that the presence of the virus globally is relatively small, a vaccine will have been developed, although a vaccination programme will not have been rolled out in all countries. Overall, confidence in travel will continue to grow, however, scarring from 2020 in terms of reduced airline capacity, accommodation, and tour operators, will temper the growth of global tourism trips. Global tourist arrivals are not expected to recover to 2019 levels until 2024.

2.5 Projections for 2023-2030

The growth rates for the period 2023-2030 are based on UNWTO growth rates that were calculated as part of their *2030 Vision* project. It is anticipated that any pent up demand for travel will have been dissipated by 2023 and beyond, and destinations will settle back into more steady growth rates.

2.6 Tourist Expenditure

Estimates for tourist expenditure are based on the latest data (2018) for average spend per tourist arrival in each country of the world and excludes international transport. Globally, the average spend per visitor has remained almost constant at approximately US$1,000 over the last 10 years, with growth in tourist arrivals driving the overall increase in tourism receipts.

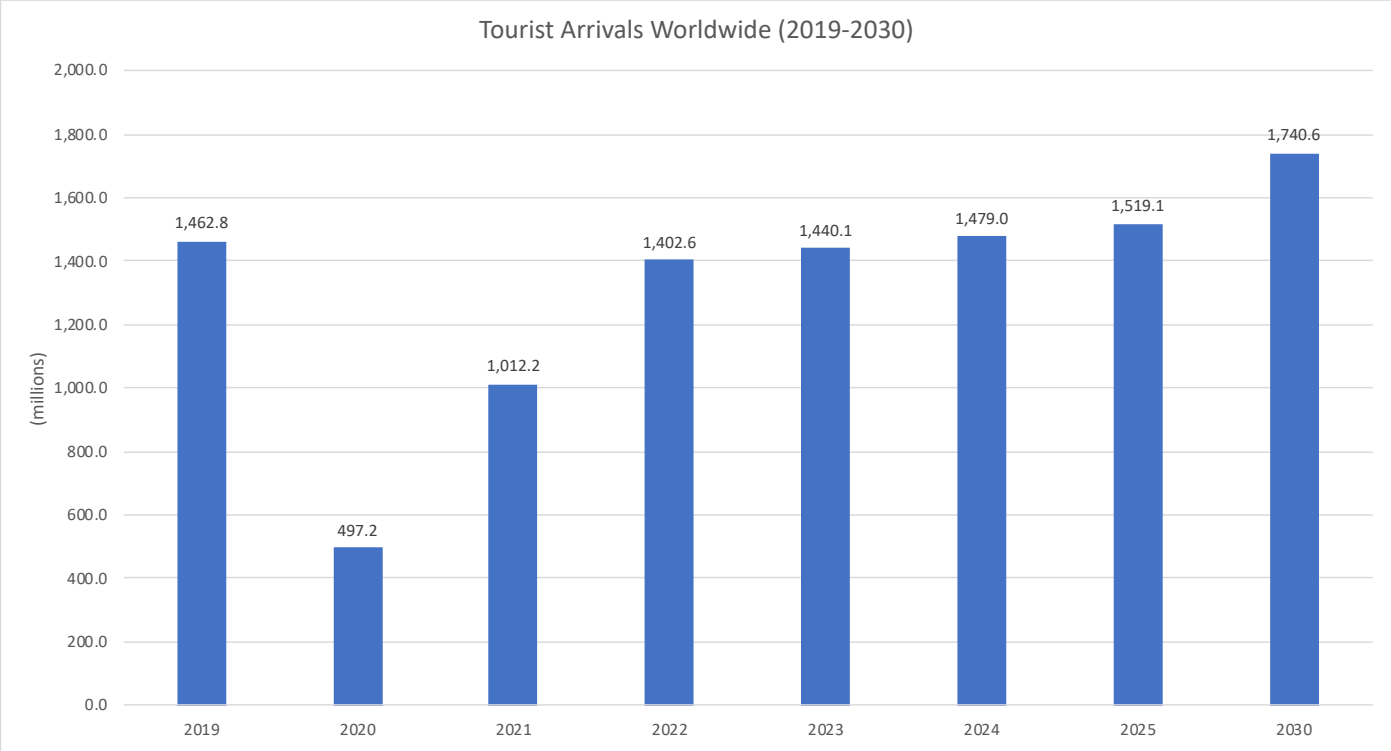
For the purpose of this model, this is not expected to change, although there is considerable debate regarding whether the cost of travel will increase post-COVID-19, thereby pushing up the average spend per trip.

3. KEY FINDINGS

3.1 Tourist Arrivals Worldwide

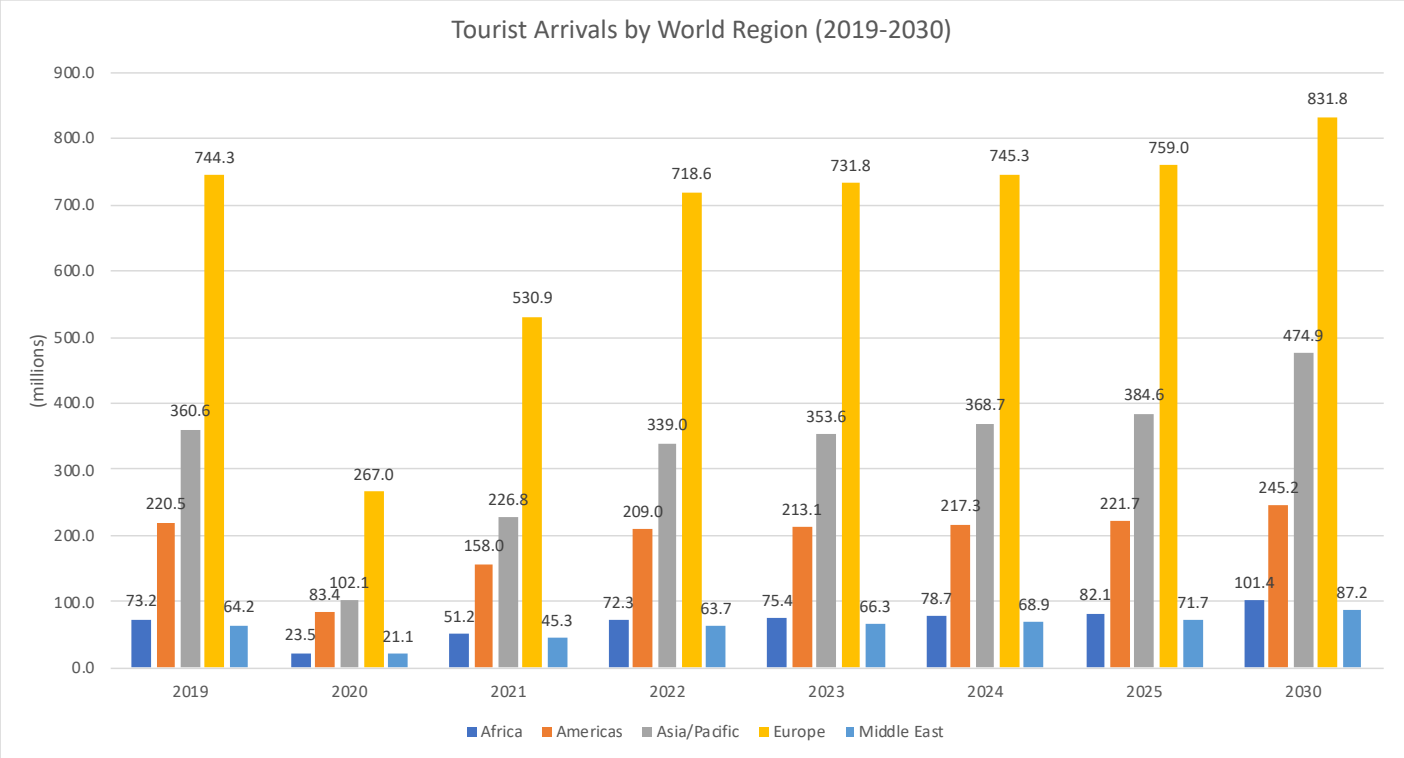
The *Jordan Forecaster Model* projects a total of 497.2 million tourist arrivals in 2020, a drop of 66% on 2019, or 965.7 million fewer international tourist arrivals worldwide.

The United Nations World Tourism Organization (UNWTO) is also undertaking forecasting work (World Tourism Barometer: May 2020) relating to the COVID-19 pandemic and is currently projecting between 850 million and 1.1. billion fewer international tourist arrivals in 2020. Their model is based on travel regions rather than origin-destination pairs, so cannot provide the level of detail the *Jordan Forecaster Model* offers. However, the two are producing very similar findings.



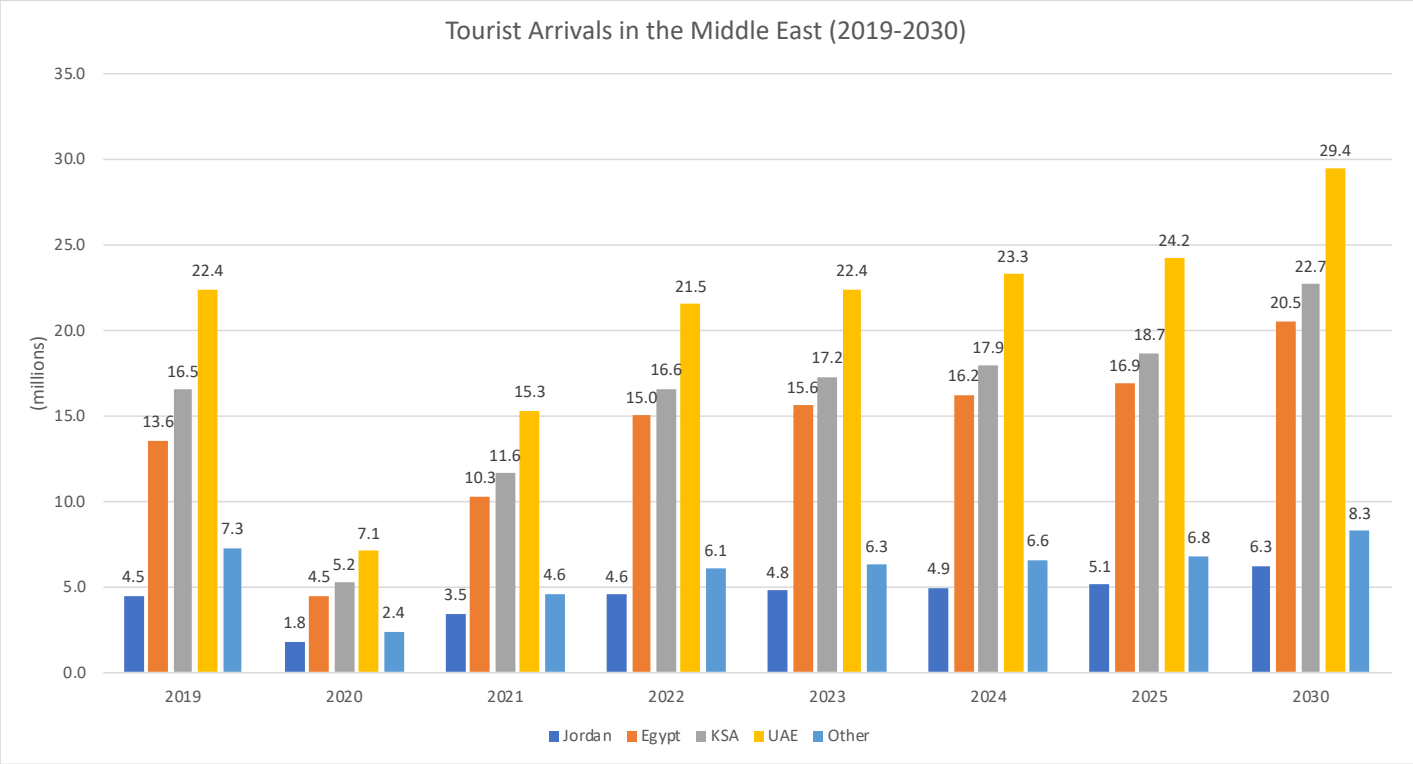
It is expected that this will be followed by growth rates of 104% in 2021 and 39% in 2022, as arrivals start to climb back towards that experienced in 2019, although this will not be achieved until 2024 when there are expected to be almost 1.5 billion international tourist arrivals worldwide. Over 1.7 billion tourists are expected to arrive in world destinations by 2030.

By world region, all five regions will be heavily impacted by the pandemic, with the Americas (-62.2%) least affected, followed by Europe (-64.1%), Middle East (-67.2%), Africa (-67.9%) and East Asia/Pacific (-71.7%).



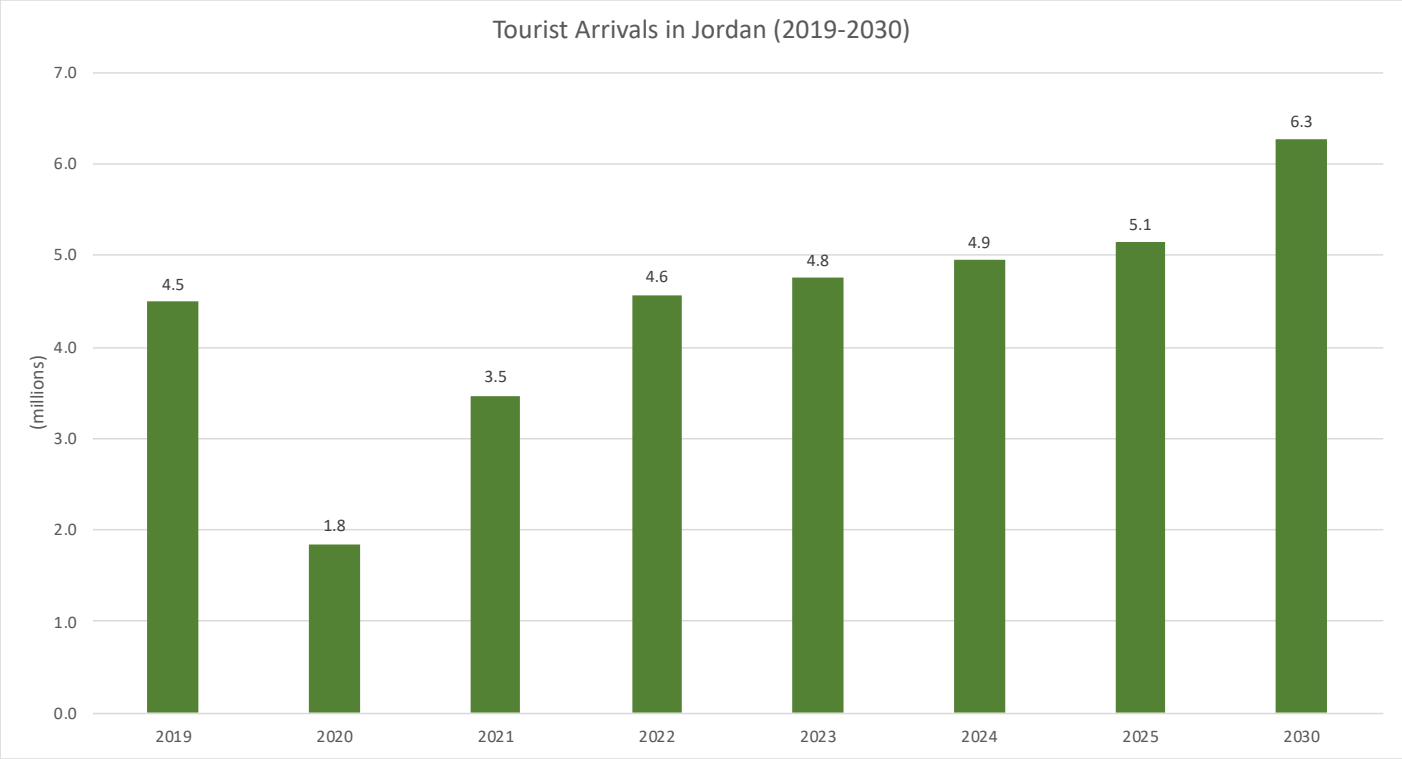
3.2 Tourist Arrivals in the Middle East

Most destinations in the Middle East are expected to fare similarly in 2020, with arrivals falling between 66% and 68%. Jordan is one exception, with an anticipated fall in arrivals of 59%, mainly due to the large number of nationals overseas who visit friends and relatives (VFR) each year. It is anticipated that this group will be one of the least affected as they will broadly feel comfortable about travelling to Jordan.



3.3 Tourist Arrivals in Jordan

There were 4.5 million international tourist arrivals in Jordan 2019, however these are projected to decline to 1.8 million in 2020, before bouncing back to 3.5 million in 2021. Unlike global tourism arrivals, it is anticipated that Jordan will exceed the number of arrivals that travelled to the country in 2019 by 2022.



Projections for arrivals by key markets (more than 10,000 arrivals in 2018) are shown in the table below.

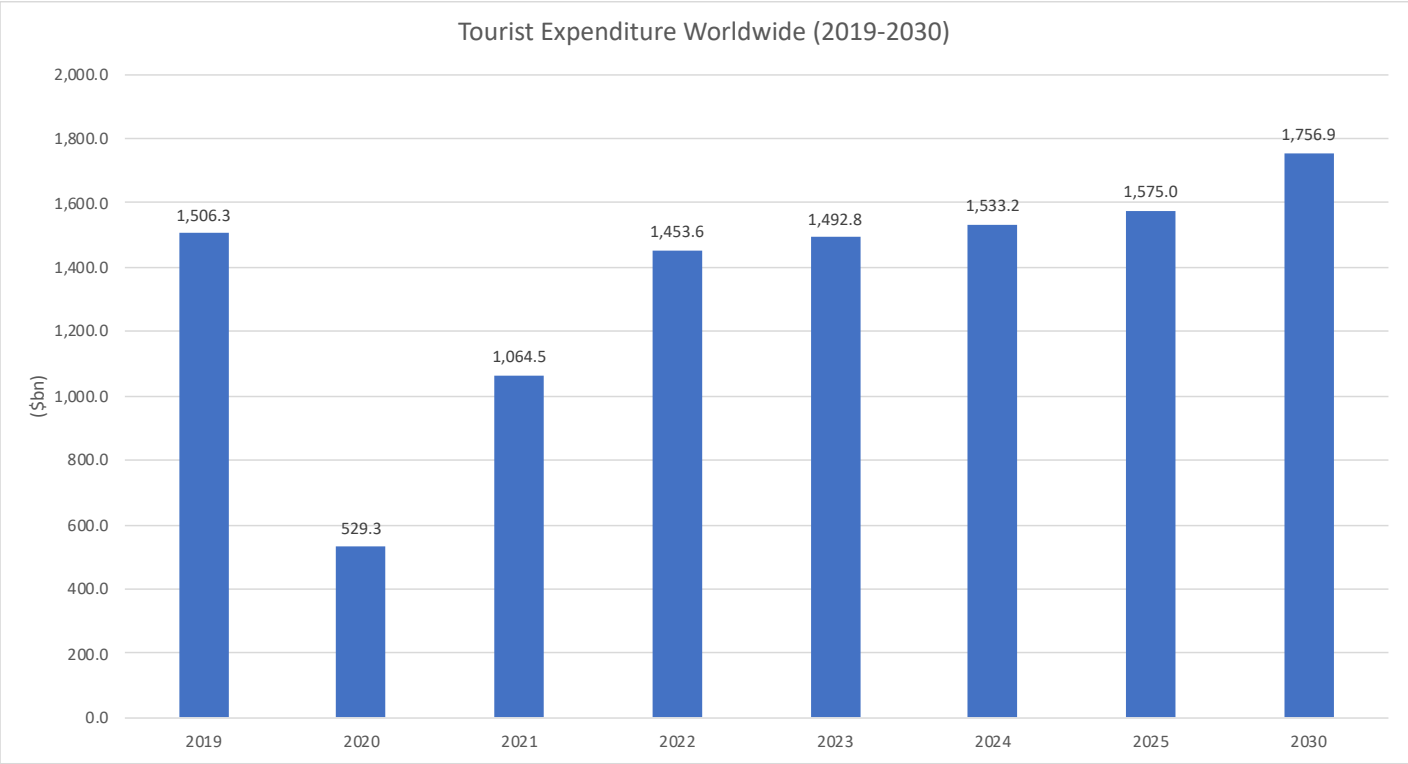
Projected Tourist Arrivals in Jordan (2019-2025, 2030)

Nationality	2019	2020	2021	2022	2023	2024	2025	2030
Sudan	12,691	4,090	8,599	11,917	12,394	12,890	13,405	13,941
South Africa	7,759	2,501	4,518	5,795	6,026	6,267	6,518	6,779
Other Africa	4,977	1,604	2,003	2,178	2,265	2,355	2,450	2,548
Total Africa	***25,427***	***8,195***	***15,121***	***19,889***	***20,685***	***21,512***	***22,373***	***23,268***
Canada	31,875	9,954	22,054	31,436	32,694	34,001	35,361	36,776
United States	139,978	62,609	114,427	147,573	153,476	159,615	165,999	172,639
Other Americas	44,396	16,861	38,029	54,740	56,930	59,207	61,575	64,038
Total Americas	***216,249***	***89,424***	***174,510***	***233,749***	***243,099***	***252,823***	***262,936***	***273,454***
China	21,865	6,172	15,566	23,857	24,811	25,804	26,836	27,909
Korea	20,322	9,394	18,524	24,824	25,817	26,849	27,923	29,040
Indonesia	19,071	6,146	13,232	18,572	19,314	20,087	20,891	21,726
Malaysia	16,351	5,270	11,050	15,292	15,904	16,540	17,202	17,890
Philippines	12,511	5,346	10,183	13,407	13,944	14,501	15,082	15,685
Australia	24,392	7,861	18,363	26,949	28,027	29,149	30,314	31,527
India	40,177	12,948	26,589	36,393	37,849	39,363	40,937	42,575
Pakistan	26,183	8,438	17,152	23,351	24,285	25,257	26,267	27,317
Other Asia and the Pacific	52,423	18,238	39,071	54,691	56,879	59,154	61,520	63,981
Total Asia/Pacific	***233,295***	***79,814***	***169,729***	***237,337***	***246,830***	***256,704***	***266,972***	***277,651***
Poland	19,084	6,150	14,159	20,611	21,435	22,293	23,184	24,112
Romania	14,160	5,979	11,598	15,412	16,029	16,670	17,337	18,030
Russia	47,247	17,589	33,170	43,454	45,192	47,000	48,880	50,835
Sweden	11,915	4,912	8,752	11,147	11,592	12,056	12,538	13,040

UK	44,319	19,823	36,545	47,335	49,228	51,197	53,245	55,375
Italy	76,721	31,631	84,304	133,440	138,778	144,329	150,102	156,106
Spain	31,777	9,764	24,984	38,614	40,158	41,764	43,435	45,172
France	58,350	24,057	53,321	76,023	79,064	82,227	85,516	88,936
Germany	58,158	24,559	50,158	68,457	71,195	74,043	77,005	80,085
Netherlands	25,071	10,336	21,052	28,690	29,838	31,031	32,273	33,563
Israel	113,201	36,482	83,268	120,643	125,469	130,487	135,707	141,135
Turkey	20,821	8,896	19,851	28,406	29,542	30,724	31,953	33,231
Other Europe	157,159	62,436	145,300	212,794	221,306	230,158	239,364	248,939
Total Europe	***677,983***	***262,616***	***586,462***	***845,025***	***878,826***	***913,979***	***950,539***	***988,560***
Bahrain	33,260	15,375	30,171	40,333	41,947	43,625	45,370	47,184
Egypt	48,094	15,500	32,089	44,110	45,875	47,710	49,618	51,603
Iraq	195,912	63,139	143,251	206,868	215,142	223,748	232,698	242,006
Kuwait	88,128	28,402	59,772	82,877	86,193	89,640	93,226	96,955
Lebanon	50,089	16,143	33,744	46,621	48,486	50,425	52,443	54,540
Libya	24,401	7,864	21,743	35,173	36,580	38,044	39,565	41,148
Oman	12,829	4,135	8,322	11,273	11,724	12,193	12,680	13,188
Qatar	29,277	9,435	22,105	32,494	33,794	35,145	36,551	38,013
Saudi Arabia	727,836	234,567	484,284	664,732	691,321	718,974	747,733	777,642
Palestine	445,057	205,741	340,660	418,848	435,602	453,026	471,147	489,993
Syria	105,990	48,997	95,067	126,352	131,407	136,663	142,129	147,814
UAE	17,651	5,689	11,439	15,487	16,107	16,751	17,421	18,118
Yemen	35,911	11,573	26,059	37,474	38,973	40,532	42,153	43,839
Other Middle East	37,139	13,169	27,106	37,146	38,632	40,177	41,784	43,455
Total Middle East	***1,851,574***	***679,728***	***1,335,813***	***1,799,790***	***1,871,781***	***1,946,653***	***2,024,519***	***2,105,500***
Jordanian Nationals	***1,483,879***	***728,972***	***1,180,608***	***1,436,614***	***1,494,079***	***1,553,842***	***1,615,996***	***1,680,636***
TOTAL	**4,488,407**	**1,848,748**	**3,462,241**	**4,572,405**	**4,755,301**	**4,945,513**	**5,143,334**	**5,349,067**

3.4 Tourist Expenditure Worldwide

The drop in international tourist arrivals worldwide is expected to lead to a loss of US$977 billion in tourist expenditure. This 65% drop in worldwide export revenues from tourism is expected to bounce back with a 101% growth in 2021, to generate US$1,065 billion, similar to what was spent in 2013 by international tourist arrivals. A further 37% growth is expected in 2022, to generate a total of US$1,454 billion, before longer term growth stabilises again.



By world region, the impact of the pandemic on inbound tourist expenditure in 2020 is expected to range between a drop of 62% and 68%. Africa and Asia/Pacific are expected to fare the worst, with declines of 67.8% and 67.7% respectively. Expenditure in the Middle East is projected to fall by 67.1%, and in Europe by 64.1%. The Americas are expected to experience a 62.0% decline.

All regions will bounce back in 2021, with the most significant being Africa (116.7%), Asia/Pacific (115.0%) and the Middle East (114.3%).

3.5 Tourist Expenditure in Jordan

Following inbound tourist expenditure of US$5.8 billion in Jordan in 2019, an expected US$2.4 billion is projected in 2020, a fall of just over 58%. A 94% growth is expected in 2021 generating a projected US$4.7 billion. The model estimates that expenditure will exceed 2019 levels by 2022.

4. ECONOMIC IMPACT

4.1 Introduction

The previous chapter sets out the key findings from the *Jordan Forecaster Model* for the expected case, identifying tourist arrivals and expenditure in Jordan and beyond over the period 2020 to 2030. This chapter utilises these projections and incorporates key indicators from the last three compilations of the Tourism Satellite Account (TSA) in 2016, 2012 and 2006-07 to estimate Tourism Direct Gross Value Added (TDGVA) and employment.

4.2 Tourism Direct Gross Value Added

Based on the expenditure projections in Jordan for 2020 and utilising the tourism satellite account for 2016 (in particular), estimates for tourism direct gross value added (TDGVA) for 2020 have been made. TDGVA is the part of gross value added generated by tourism industries and other industries of the economy that directly serve visitors in response to internal tourism consumption

Two key assumptions have been made when estimating TDGVA for 2020:

- The percentage of output that has been allocated to intermediate consumption for each of the products is unchanged from 2016.
- Domestic tourism expenditure (as a percentage of inbound tourism expenditure) will be double that recorded in 2016, due to the restrictions on international travel in place during part of 2020 and the pent-up demand amongst residents of Jordan to take a leisure trip.

The projections show that there is expected to be US$1,144 million (JD 811.4 million) TDGVA in 2020, as shown in the table below.

Estimated Tourism Direct Gross Value Added in Jordan, 2020

PRODUCT	2020	
	JD(m)	US$(m)
Specific Products		
Accommodation	192.8	271.8
Food and Beverage	268.1	378.0
Passenger Transport Services		
Land and Sea	174.0	245.3
Air	301.9	425.7
Travel Agencies and Similar	62.5	88.2
Entertainment	226.9	319.9
Non-Specific Products		
Goods and Services	413.1	582.5
Total Output at Basic Prices	1,639.3	2,311.4
Total Intermediate Consumption	827.9	1,167.4
Total Tourism Direct Gross Value Added	**811.4**	**1,144.1**

4.3 Employment

4.3.1 Introduction

The Tourism Satellite Account estimates direct tourism employment (jobs created) by using the tourism ratios that are calculated in Table 6 of the TSA (where TDGVA and Tourism GDP are calculated). The tourism ratios identify the percentage of the output of *Specific Products* and *Non-Specific Products* that are due to tourism activity.

An example is shown below from the UK TSA. This shows the tourism ratios that have been calculated in Table 6 of the TSA in green. These percentages are multiplied by the total number of jobs measured in each of the sectors, including *Other Consumption Products* (that is, those industries not identified as *Tourism Characteristic* but for which tourism does create some jobs (shown in the second row from the bottom).

TABLE 7: United Kingdom TSA - Employment in the Tourism Industries (thousands, except number of enterprises), 2017

Tourism Activities	Number of Enterprises	Male	Female	Total	Tourism ratios	Tourism Direct
Accommodation services for visitors	17,351	224	282	505	75.2%	380
Food and beverage serving activities	135,495	899	970	1,869	22.4%	419
Railway passenger transport services	68	93	18	111	32.1%	36
Road passenger transport services	12,937	321	54	374	10.0%	37
Water passenger transport services	725	5	2	7	17.5%	1
Air passenger transport services	487	35	35	70	38.9%	27
Transport equipment rental services	3,832	29	12	41	8.6%	4
Travel agencies & other reservation services	8,086	51	62	113	45.3%	51
Cultural activities	31,428	150	145	295	20.9%	62
Sport and recreation activities	18,506	275	241	516	23.8%	123
Exhibitions & Conferences etc	4,165	39	36	75	0.8%	1
Other Consumption Products				*30,704*	*1.4%*	421
TOTAL	**233,080**	**2,120**	**1,858**	**3,978**	**3.4%**	**1,561**

In 2016, the Jordan TSA identified that tourism generated 88,506 jobs in the country. Of these, 59,198 were generated by *Tourism Characteristic Activities*, with the other 29,308 being generated by those activities that are not classified as *tourism characteristic* (Other Consumption Products), but which in Jordan would not exist in the absence of tourism. The healthcare sector is one such example – jobs are created in Jordan due to health tourism by visitors travelling to the country for medical procedures.

4.3.2 Tourism Employment Projections in Jordan

For the purposes of this study, a relationship between tourist expenditure and employment has been established to estimate jobs created by tourism. It should be noted that these are projections and the actual impact on employment by the COVID-19 pandemic on employment will depend on government job retention schemes and other policies put in place by businesses to retain staff over what is expected to be a short term drop in demand.

The model shows that an estimated 96,950 jobs were generated by tourism in Jordan in 2019. However, due to the drop-in tourism demand in 2020, these will fall to around 52,500 (a drop of almost 46% or around 44,500 fewer jobs required).

Estimated Jobs Generated by Tourism in Jordan, 2019-2024

Sector	2019	2020	2021	2022	2023	2024
Accommodation	14,421	7,808	11,838	14,189	14,692	15,212
Food and Beverage	19,598	10,611	16,089	19,283	19,967	20,674
Land and Sea Passenger	17,538	9,496	14,397	17,256	17,868	18,501
Air Passenger	3,793	2,053	3,113	3,732	3,864	4,001
Travel Agencies and Similar	5,112	2,768	4,197	5,030	5,208	5,393
Entertainment	4,384	2,374	3,599	4,314	4,467	4,625
Other Goods and Services	32,104	17,382	26,354	31,588	32,707	33,866
TOTAL	**96,950**	**52,491**	**79,587**	**95,392**	**98,772**	**102,273**

However, the bounce-back is expected to be strong, and by 2024 it is estimated that over 102,000 jobs will be created by tourism in Jordan.

5. SCENARIO MODELLING FOR 2020

5.1 Introduction

The findings in Chapters 3 and 4 show what is currently expected to be the outcome during 2020 and beyond, based on all the external factors discussed in Chapter 2. However, these factors could change to generate more favourable or less favourable outcomes. Four alternative scenarios have been explored using the model to demonstrate different outcomes.

5.2 More Favourable Outcomes

Scenario 1: Most Optimistic Case

In this scenario the following have been assumed:

- There will be a more rapid easing of travel restrictions worldwide, with passage between most countries easing significantly in August 2020 instead of October 2020.
- Pent-up demand for travel will lead to higher demand for air travel than expected in the base case.
- Jordanians overseas will be significantly more likely to return to Jordan for a visit.

Scenario 2: Optimistic Case

This scenario is as Scenario 1 above, except Jordanians' desire to travel is unchanged from the base case.

5.3 Less Favourable Outcomes

Scenario 4: Pessimistic Case

This scenario is as Scenario 5 below, except there will be travel restrictions in place until the end of October 2020 (instead of December 2020) similar to those in operation in April and May.

Scenario 5: Most Pessimistic Case

In this scenario the following have been assumed:

- There will be continued travel restrictions until the end of December 2020 similar to those in operation in April and May.
- Demand for travel between countries (where it is possible) will diminish, as will travel by vehicle between nearby countries.
- Jordanians overseas will be significantly less likely to return to Jordan for a visit.

5.4 Results from the Scenarios

The *Jordan Forecaster Model* shows a variance of outputs from the various different scenarios for 2020 as shown below. These indicate that in the most pessimistic case tourist arrivals could fall to as low as 0.9 million, generating just US$1.1 billion, with a TDGVA of US$0.5 billion.

Scenario Variations showing Arrivals, Expenditure, TGVA and Employment, 2020

Scenario	Tourist Arrivals (million)	Expenditure (US$ bn)	TDGVA (US$ bn)	Employment (Jobs)
Scenario 1: Most Optimistic Case	2.5	3.3	1.6	60,653
Scenario 2: Optimistic Case	2.1	2.8	1.3	56,226
Scenario 3: Expected Case	1.8	2.4	1.1	52,491
Scenario 4: Pessimistic Case	1.2	1.6	0.7	44,476
Scenario 5: Most Pessimistic Case	0.9	1.1	0.5	40,662

Conversely, in the most optimistic scenario, Jordan could experience 2.5 million arrivals, spending US$3.3 billion, and generating US$1.6 billion TDGVA.

6. CONTEXTUAL BACKGROUND

6.1 Introduction

This section of the report provides insight into the potential future of the tourism sector over the period to 2023, to put the figures in the previous chapter into some sort of context, and provide an indication of what can be expected over the next 3-4 years.

One of the most frequently asked question is: "When will travel return to normal?" The simple answer to this is that it won't. It will look different to how it was before, and a *new normal* will take the place of how travel used to be.

Unlike other crises, such as terrorist attacks and natural disasters, this is not a crisis that has happened on a single day, somewhere else, and to other people. It has left no country untouched, and because its impact has become deeply embedded in the psyche of a generation worldwide, its legacy is likely to have a considerably greater impact in changing people's behaviour for years after it is over.

The return to travel at this time depends on countries exiting their various government-imposed social and travel restrictions. This is likely to come from a mix of testing, tracing and isolating the vulnerable, plus, ultimately, vaccination. Consequently, those countries with more fragile economies and less robust healthcare systems will suffer more and take longer to rejuvenate their tourism economies. However, as long as pockets of the virus remain in any one country, the prospect of global re-infection remains.

Historically, tourism has been one of the most resilient economic sectors, and fastest to recover after a crisis, largely because of people's strong desire to travel. However, current health concerns arise from the fundamental essence of tourism – the movement of people. Proximity has been not only unavoidable as part of the travelling process – crowded planes, trains, coaches, theatres, restaurants, visitor attractions, festivals, etc; it has also been a significant motivator of travel – the desire to meet new people and experience different cultures.

Social distancing is likely to remain a priority for some time, at least until widespread vaccination is achieved. Consequently an inverse relationship between distance and desire is likely to emerge, whereby the further away is less appealing and the closer to home more appealing due to its familiarity and sense of security, at least in the short to medium term.

This is likely to lead to an increase in the cost of travel, higher insurance costs, less disposable income amongst populations with more people unemployed, and enduring health concerns, not to mention a potentially substantial reduction in the number of surviving tourism businesses.

6.2 This Year: 2020

Firstly, looking at the supply and demand sides of tourism. From the supply side, the survival of tourism businesses in 2020 will largely depend on governmental support as there will be limited revenue opportunities. There is much debate over whether health should be prioritised over the economy, however in truth the two are inextricably linked. The more people's health is put at risk, the more the economy is jeopardised. Consequently, governments in many countries have stepped in with a range of supporting measures.

On the demand side, the threat of reduced income and unemployment during the early stages of the pandemic might represent a longer-term change in younger people's economic behaviour, so might health and safety concerns remain embedded in people's travel decision-making for the foreseeable future, particularly if the virus has not been eradicated worldwide.

There is likely to be significantly different fortunes of international and domestic tourism. Internationally, destinations are beginning to discriminate against travellers from certain markets, based on their perception of how these countries have handled the health crisis at home, and consequently the risk they pose to their intended destinations.

6.3 Next Year: 2021

Global output is predicted to fall by 3% in 2020, with a cumulative loss to global GDP of around 9 trillion US dollars. This will mean that by 2021 fewer people will have disposable income to spend, which means the slower economic recovery will be, not least in the tourism sector.

Whilst a vaccine remains unlikely until well into 2021 at the earliest, the prospect of testing, tracing and isolating the vulnerable should enable those who have tested negative or are believed to have had the virus to resume an economically active role. This is when those businesses that have survived will start to resume activities in a meaningful way. The majority of trips in the first part of the year are likely to be domestic or to destinations relatively close to home, with an emphasis on those countries perceived to be the safest. It is likely that tour operators will be unable to commit to programmes and prices with any degree of certainty, and therefore a growth in independent travel is expected.

Social distancing is likely to remain an issue, so places with plenty of space are likely to be favoured over crowded places: the natural environment rather than city breaks; the great outdoors rather than indoor attractions; furnished apartments rather than hotels, which involves less exposure to strangers, and probably greater reliance on the car as a means of transport in which people can isolate themselves more than on public transport. A preference for the car may be another factor influencing trips to nearer destinations, rather than those further afield that can only be reached by flying. Nevertheless, more resilient and predominantly younger travellers will probably be the first to return to remoter and more adventurous destinations, but only gradually and in limited numbers.

Apart from the issue of restoring traveller confidence, a reboot of the tourism industry will be required, both strategically and technically, which will not happen overnight. Planes that have stood for weeks on tarmac will need to be checked and tested, furloughed staff may need retraining, and communications campaigns will need to be mounted to let people know what is open, where, and how safe it is. Parts of the entire tourism infrastructure will need to be redesigned for a new social-distancing world, from visitor flows, spacing and hygiene in airports and hotels, to aircraft, trains, coaches, cruise ships and public transport.

At the level of customer reassurance, the introduction of hygiene certification is likely to emerge, aimed at consumers rather than health inspectors. Singapore has already introduced an independently assessed stamp for hotels. Other destinations are expected to follow suit with *clean* label certification as a reassurance measure for travellers. There is historical evidence that these work at a practical level too, with the success of the introduction of simple hand sanitisation measures on Nile cruise boats several years ago, which immediately reduced the incidence of stomach bugs and restored this market.

6.4 2022 and Beyond

Mass vaccination will not represent the end of the crisis, but it will mark the move from *hesitancy to travel* and the *confidence to travel again*, even if traveller confidence might still lag behind the extent of vaccination. This looks unlikely to happen before the second half of 2021, and it may not be widely implemented until early-mid 2022 (if at all).

Even then, it is unlikely vaccination will be widespread in poorer countries, leaving open the possibility of reinfection. This will remain the biggest question mark – the global extent of vaccination, which will determine whether the virus is eradicated worldwide and what level of risk remains. It is not known yet whether governments will ban travel to countries where the virus has not been eradicated to stop travellers bringing it back home. Clearly, international cooperation in the form of common standards for COVID-19 related entry requirements, and a massive effort to eradicate the virus through global vaccination will be required to get the whole world travelling again.

The re-emergence of business travel as a strong growth sector is expected to lag behind leisure tourism. Conference call apps such as Zoom will be the major beneficiaries in the short term, and their usage will continue to be higher than they were before the pandemic started. However, there will still be a demand for social contact, even at a distance, in the form of face-to-face meetings, conferences and exhibitions.

6.5 Summary

Whilst these are extraordinary times for the travel and tourism sector, there is light at the end of the tunnel. Resumption of travel will depend on medical advances and their speed of implementation. However, countries will recover at variable speeds, and as long as the virus persists, even in isolated geographical pockets, caution will play a significant role in the choice of destinations people visit, the type of tourism products they buy, and the experiences they participate in.

International travel is unlikely to return to 2019 levels before 2024. However, those destinations and tourism businesses that can address travellers' anxieties, while still communicating their inherent appeals, will stand the best chance of faster business rejuvenation.

As the world starts to travel again the level of anxiety will subside, but its legacy will remain to some extent and demonstrating healthcare capacity will, for some destinations, become an important element of their tourism marketing.

Addressing visitor concerns could lead to higher prices, as people demand more space and safety reassurance, thereby increasing costs and reducing visitor throughput over time for businesses. It will also add to the bureaucracy of travel as countries introduce vaccination certification as an entry requirement plus, possibly, the reintroduction of visas for citizens who previously travelled visa-free.

There is an alternative scenario, with low oil prices, an oversupply of idle planes, and reduced prices from tourism operators to stimulate cash flow generating a spate of affordable holidays to kick-start travel. Many commentators argue that consumer spending will be very fragile as the world emerges from the pandemic, and they will be highly sensitive to any attempt to boost revenue by increasing fees. Others argue that prices have to rise, if only because such low prices are unlikely to remain sustainable in the face of a generally higher cost base, resulting from traveller demand for more personal space.

APPENDIX A: FULL MODEL RESULTS – TOURIST ARRIVALS (2019-2025, 2030)

DESTINATION	2019	2020	2021	2022	2023	2024	2025	2030
AFRICA								
Morocco	12,927,721	3,988,821	8,876,833	12,684,832	13,192,225	13,719,914	14,268,710	17,360,068
Other North Africa	13,205,279	4,067,754	9,359,857	13,621,831	14,166,704	14,733,372	15,322,707	18,642,416
Total North Africa	***26,133,000***	***8,056,576***	***18,236,690***	***26,306,662***	***27,358,929***	***28,453,286***	***29,591,417***	***36,002,484***
South Africa	10,231,247	3,376,074	6,871,999	9,363,408	9,784,761	10,225,075	10,685,204	13,315,708
Other Sub-Saharan Africa	36,836,753	12,100,137	26,077,707	36,621,063	38,269,011	39,991,116	41,790,717	52,078,836
Total Sub-Saharan Africa	***47,068,000***	***15,476,210***	***32,949,706***	***45,984,471***	***48,053,772***	***50,216,192***	***52,475,920***	***65,394,544***
Total Africa	**73,201,000**	**23,532,786**	**51,186,396**	**72,291,133**	**75,412,701**	**78,669,478**	**82,067,338**	**101,397,028**
AMERICAS								
Canada	22,148,278	6,519,438	14,969,580	21,765,088	22,069,799	22,378,776	22,692,079	24,325,628
Mexico	45,365,521	19,184,674	34,905,423	45,042,133	45,672,722	46,312,141	46,960,511	50,341,087
United States	79,267,442	31,608,613	56,612,655	73,136,024	74,159,929	75,198,168	76,250,942	81,740,067
Total North America	***146,781,241***	***57,312,725***	***106,487,658***	***139,943,245***	***141,902,450***	***143,889,085***	***145,903,532***	***156,406,782***
Total Caribbean	***27,051,000***	***9,582,967***	***19,333,954***	***26,219,484***	***26,665,215***	***27,118,523***	***27,579,538***	***30,004,871***
Total Central America	***11,105,000***	***3,934,008***	***7,835,316***	***10,554,882***	***11,029,852***	***11,526,195***	***12,044,874***	***15,010,104***
Total South America	***35,563,000***	***12,598,390***	***24,323,744***	***32,247,104***	***33,504,741***	***34,811,426***	***36,169,071***	***43,794,049***
Total Americas	**220,500,241**	**83,428,091**	**157,980,672**	**208,964,714**	**213,102,258**	**217,345,229**	**221,697,015**	**245,215,805**
ASIA AND THE PACIFIC								
China	65,730,500	18,523,479	44,622,880	66,694,228	69,495,385	72,414,192	75,455,588	92,689,385
Hong Kong	23,761,313	7,280,602	14,704,157	20,071,659	20,914,669	21,793,085	22,708,395	27,894,914
Japan	32,189,995	12,969,526	23,674,801	31,098,441	32,404,576	33,765,568	35,183,722	43,219,563
Korea	17,442,000	6,967,381	13,570,629	18,374,993	19,146,743	19,950,906	20,788,844	25,536,945
Macao	18,640,944	5,888,137	12,743,728	18,142,076	18,904,044	19,698,013	20,525,330	25,213,245
Taiwan	11,863,510	3,822,076	8,333,519	11,790,726	12,285,936	12,801,946	13,339,627	16,386,352

Other North East Asia	982,737	352,949	690,847	922,332	961,070	1,001,435	1,043,495	1,281,826
Total North East Asia	***170,611,000***	***42,834,624***	***94,665,760***	***135,996,015***	***141,707,847***	***147,659,577***	***153,861,279***	***189,002,667***
Indonesia	13,864,860	4,220,073	9,441,747	13,541,941	14,124,244	14,731,587	15,365,045	18,965,110
Malaysia	26,090,678	8,276,132	17,690,053	24,760,766	25,825,479	26,935,975	28,094,222	34,676,763
Singapore	15,113,190	4,685,804	10,359,914	14,763,555	15,398,387	16,060,518	16,751,120	20,675,947
Thailand	39,781,678	12,374,764	27,424,657	39,172,168	40,856,571	42,613,404	44,445,780	54,859,529
Vietnam	18,008,433	5,458,394	12,942,977	19,181,829	20,006,647	20,866,933	21,764,211	26,863,616
Other South East Asia	24,400,161	7,639,837	17,682,098	25,816,942	26,927,070	28,084,934	29,292,587	36,155,907
Total South East Asia	***137,259,000***	***42,655,004***	***95,541,446***	***137,237,200***	***143,138,400***	***149,293,351***	***155,712,965***	***192,196,873***
India	17,980,969	5,583,523	12,301,683	17,484,031	18,410,685	19,386,451	20,413,933	26,428,258
Other South Asia	17,278,031	5,359,818	12,285,932	17,842,616	18,788,275	19,784,053	20,832,608	26,970,282
Total South Asia	***35,259,000***	***10,943,340***	***24,587,615***	***49,046,989***	***51,646,479***	***54,383,743***	***57,266,081***	***74,137,736***
Total Oceania	***17,453,000***	***5,715,650***	***12,051,273***	***16,726,737***	***17,061,271***	***17,402,497***	***17,750,547***	***19,598,038***
Total Asia and the Pacific	**360,582,000**	**102,148,619**	**226,846,094**	**339,006,940**	**353,553,998**	**368,739,167**	**384,590,872**	**474,935,314**
EUROPE								
Denmark	12,876,323	4,060,118	8,699,597	12,180,539	12,351,066	12,523,981	12,699,317	13,613,510
Ireland	11,319,280	5,170,679	8,322,305	10,171,312	10,313,710	10,458,102	10,604,516	11,367,910
UK	36,933,372	14,735,324	26,846,530	34,799,849	35,287,047	35,781,065	36,282,000	38,893,856
Other Northern Europe	18,745,025	6,856,743	13,300,612	17,675,516	17,922,973	18,173,895	18,428,329	19,754,941
Total Northern Europe	***79,874,000***	***30,822,864***	***57,169,044***	***74,827,215***	***75,874,796***	***76,937,043***	***78,014,162***	***83,630,217***
Austria	31,894,295	13,479,004	23,859,901	30,375,890	30,801,152	31,232,368	31,669,621	33,949,442
France	90,125,795	33,295,921	63,603,463	84,211,867	85,390,833	86,586,305	87,798,513	94,118,920
Germany	39,580,571	15,953,523	29,575,182	38,541,260	39,080,838	39,627,970	40,182,761	43,075,423
Netherlands	20,282,406	7,830,439	15,075,258	20,017,121	20,297,361	20,581,524	20,869,665	22,372,023
Switzerland	11,855,158	3,565,292	7,942,069	11,374,808	11,534,056	11,695,532	11,859,270	12,712,991
Other Western Europe	10,594,774	3,800,211	7,398,181	9,849,743	9,987,639	10,127,466	10,269,250	11,008,509
Total Western Europe	***204,333,000***	***77,924,390***	***147,454,054***	***194,370,689***	***197,091,878***	***199,851,165***	***202,649,081***	***217,237,309***

Hungary	17,323,499	5,688,483	11,732,163	16,095,352	16,497,736	16,910,180	17,332,934	19,610,624
Poland	21,387,980	6,568,192	14,921,259	21,563,823	22,102,918	22,655,491	23,221,879	26,273,424
Russia	24,428,155	7,538,893	16,301,246	22,945,241	23,518,872	24,106,844	24,709,515	27,956,548
Ukraine	13,342,466	4,458,239	8,886,660	11,982,641	12,282,207	12,589,262	12,903,994	14,599,685
Other Central/Eastern Europe	79,674,899	25,405,229	56,471,919	80,641,685	82,657,727	84,724,171	86,842,275	98,254,063
Total Central/Eastern Europe	***156,157,000***	***49,659,036***	***108,313,246***	***153,228,743***	***157,059,461***	***160,985,948***	***165,010,596***	***186,694,344***
Croatia	16,839,100	7,016,169	12,598,373	16,140,508	16,447,178	16,759,674	17,078,108	18,763,363
Greece	31,357,825	13,067,306	23,427,097	29,965,924	30,535,277	31,115,447	31,706,640	34,835,428
Italy	64,522,377	24,197,975	46,744,338	62,142,449	63,323,156	64,526,296	65,752,295	72,240,682
Portugal	17,254,276	5,242,641	11,849,629	17,089,336	17,414,033	17,744,900	18,082,053	19,866,376
Spain	83,683,661	25,109,987	55,892,359	79,876,603	81,394,259	82,940,750	84,516,624	92,856,660
Turkey	51,214,072	19,772,945	38,843,140	52,050,789	53,039,754	54,047,509	55,074,412	60,509,113
Other Southern/Med Europe	39,081,688	14,181,442	28,647,421	38,875,192	39,613,821	40,366,484	41,133,447	45,192,464
Total Southern/Med Europe	***303,953,000***	***108,588,464***	***218,002,356***	***296,140,802***	***301,767,477***	***307,501,059***	***313,343,579***	***344,264,087***
Total Europe	**744,317,000**	**266,994,755**	**530,938,700**	**718,567,448**	**731,793,613**	**745,275,215**	**759,017,419**	**831,825,956**
MIDDLE EAST								
Jordan	4,488,407	1,848,748	3,462,241	4,572,405	4,755,301	4,945,513	5,143,334	6,257,652
Egypt	13,558,356	4,470,109	10,289,455	15,009,519	15,609,899	16,234,295	16,883,667	20,541,563
Saudi Arabia	16,515,079	5,249,774	11,625,687	16,582,040	17,245,321	17,935,134	18,652,540	22,693,667
UAE	22,371,675	7,094,140	15,294,820	21,504,089	22,364,253	23,258,823	24,189,176	29,429,831
Other Middle East	7,301,483	2,410,647	4,600,483	6,063,164	6,305,690	6,557,918	6,820,234	8,297,858
Total Middle East	**64,235,000**	**21,073,418**	**45,272,686**	**63,731,217**	**66,280,465**	**68,931,684**	**71,688,951**	**87,220,571**
TOTAL	**1,462,835,241**	**497,177,668**	**1,012,224,547**	**1,402,561,453**	**1,440,143,034**	**1,478,960,772**	**1,519,061,595**	**1,740,594,673**

APPENDIX B: FULL MODEL RESULTS – TOURIST EXPENDITURE (2019-2025, 2030) (US$ million)

DESTINATION	2019	2020	2021	2022	2023	2024	2025	2030
AFRICA								
Morocco	8,144	2,513	5,592	7,991	8,311	8,644	8,989	10,937
Other North Africa	7,395	2,278	5,242	7,628	7,933	8,251	8,581	10,440
Total North Africa	***15,539***	***4,791***	***10,834***	***15,620***	***16,244***	***16,894***	***17,570***	***21,377***
South Africa	8,697	2,870	5,841	7,959	8,317	8,691	9,082	11,318
Other Sub-Saharan Africa	20,629	6,776	14,604	20,508	21,431	22,395	23,403	29,164
Total Sub-Saharan Africa	***29,325***	***9,646***	***20,445***	***28,467***	***29,748***	***31,086***	***32,485***	***40,483***
Total Africa	**44,865**	**14,437**	**31,279**	**44,086**	**45,992**	**47,981**	**50,055**	**61,859**
AMERICAS								
Canada	27,685	8,149	18,712	27,206	27,587	27,973	28,365	30,407
Mexico	24,951	10,552	19,198	24,773	25,120	25,472	25,828	27,688
United States	213,229	85,027	152,288	196,736	199,490	202,283	205,115	219,881
Total North America	***265,866***	***103,728***	***190,198***	***248,715***	***252,197***	***255,728***	***259,308***	***277,975***
Total Caribbean	***42,470***	***15,045***	***30,354***	***41,165***	***41,864***	***42,576***	***43,300***	***47,108***
Total Central America	***14,437***	***5,114***	***10,186***	***13,721***	***14,339***	***14,984***	***15,658***	***19,513***
Total South America	***46,232***	***16,378***	***31,621***	***41,921***	***43,556***	***45,255***	***47,020***	***56,932***
Total Americas	**369,004**	**140,265**	**262,359**	**345,523**	**351,957**	**358,543**	**365,286**	**401,528**
ASIA AND THE PACIFIC								
China	42,068	11,855	28,559	42,684	44,477	46,345	48,292	59,321
Hong Kong	29,939	9,174	18,527	25,290	26,352	27,459	28,613	35,148
Japan	43,456	17,509	31,961	41,983	43,746	45,584	47,498	58,346
Korea	21,105	8,431	16,420	22,234	23,168	24,141	25,155	30,900

Macao	40,824	12,895	27,909	39,731	41,400	43,139	44,950	55,217
Taiwan	14,711	4,739	10,334	14,620	15,235	15,874	16,541	20,319
Other North East Asia	993	356	698	932	971	1,011	1,054	1,295
Total North East Asia	***193,095***	***64,959***	***134,407***	***187,474***	***195,348***	***203,553***	***212,102***	***260,546***
Indonesia	17,054	5,191	11,613	16,657	17,373	18,120	18,899	23,327
Malaysia	19,829	6,290	13,444	18,818	19,627	20,471	21,352	26,354
Singapore	21,158	6,560	14,504	20,669	21,558	22,485	23,452	28,946
Thailand	65,640	20,418	45,251	64,634	67,413	70,312	73,336	90,518
Vietnam	11,705	3,548	8,413	12,468	13,004	13,564	14,147	17,461
Other South East Asia	27,109	8,488	19,645	28,683	29,916	31,202	32,544	40,169
Total South East Asia	***162,495***	***50,495***	***112,870***	***161,929***	***168,892***	***176,154***	***183,729***	***226,777***
India	29,489	9,157	20,175	28,674	30,194	31,794	33,479	43,342
Other South Asia	17,287	5,362	12,292	17,852	18,798	19,794	20,843	26,984
Total South Asia	***46,775***	***14,519***	***32,467***	***46,525***	***48,991***	***51,588***	***54,322***	***70,326***
Total Oceania	***22,165***	***7,259***	***15,305***	***21,243***	***21,668***	***22,101***	***22,543***	***24,890***
Total Asia and the Pacific	**424,531**	**137,232**	**295,049**	**417,171**	**434,899**	**453,396**	**472,696**	**582,538**
EUROPE								
Denmark	9,142	2,883	6,177	8,648	8,769	8,892	9,017	9,666
Ireland	6,452	2,947	4,744	5,798	5,879	5,961	6,045	6,480
UK	52,815	21,072	38,391	49,764	50,460	51,167	51,883	55,618
Other Northern Europe	14,996	5,485	10,640	14,140	14,338	14,539	14,743	15,804
Total Northern Europe	***83,405***	***32,387***	***59,951***	***78,350***	***79,447***	***80,559***	***81,687***	***87,567***
Austria	23,921	10,109	17,895	22,782	23,101	23,424	23,752	25,462
France	65,792	24,306	46,431	61,475	62,335	63,208	64,093	68,707
Germany	43,934	17,708	32,828	42,781	43,380	43,987	44,603	47,814
Netherlands	19,471	7,517	14,472	19,216	19,485	19,758	20,035	21,477
Switzerland	17,190	5,170	11,516	16,493	16,724	16,959	17,196	18,434

Other Western Europe	8,476	3,040	5,919	7,880	7,990	8,102	8,215	8,807
Total Western Europe	***178,784***	***67,851***	***129,061***	***170,627***	***173,016***	***175,438***	***177,894***	***190,700***
Hungary	6,929	2,275	4,693	6,438	6,599	6,764	6,933	7,844
Poland	15,399	4,729	10,743	15,526	15,914	16,312	16,720	18,917
Russia	11,481	3,543	7,662	10,784	11,054	11,330	11,613	13,140
Ukraine	1,334	446	889	1,198	1,228	1,259	1,290	1,460
Other Central/Eastern Europe	63,740	20,324	45,178	64,513	66,126	67,779	69,474	78,603
Total Central/Eastern Europe	***98,884***	***31,318***	***69,164***	***98,460***	***100,921***	***103,445***	***106,031***	***119,964***
Croatia	11,956	4,981	8,945	11,460	11,677	11,899	12,125	13,322
Greece	17,874	7,448	13,353	17,081	17,405	17,736	18,073	19,856
Italy	51,618	19,358	37,395	49,714	50,659	51,621	52,602	57,793
Portugal	15,011	4,561	10,309	14,868	15,150	15,438	15,731	17,284
Spain	82,010	24,608	54,775	78,279	79,766	81,282	82,826	91,000
Turkey	28,168	10,875	21,364	28,628	29,172	29,726	30,291	33,280
Other Southern/Med Europe	31,265	11,345	22,918	31,100	31,691	32,293	32,907	36,154
Total Southern/Med Europe	***237,902***	***83,177***	***169,059***	***231,129***	***235,521***	***239,996***	***244,555***	***268,688***
Total Europe	**598,975**	**214,733**	**427,235**	**578,566**	**588,905**	**599,437**	**610,167**	**666,920**
MIDDLE EAST								
Jordan	5,786	2,429	4,713	6,417	6,831	7,272	7,742	10,584
Egypt	13,830	4,560	10,495	15,310	15,922	16,559	17,221	20,952
Saudi Arabia	12,882	4,095	9,068	12,934	13,451	13,989	14,549	17,701
UAE	29,978	9,506	20,495	28,815	29,968	31,167	32,413	39,436
Other Middle East	6,440	2,069	3,790	4,801	4,836	4,862	4,878	4,769
Total Middle East	**68,916**	**22,659**	**48,561**	**68,277**	**71,008**	**73,849**	**76,803**	**93,442**
TOTAL	**1,506,291**	**529,326**	**1,064,484**	**1,453,624**	**1,492,761**	**1,533,206**	**1,575,007**	**1,806,287**

APPENDIX C: FULL MODEL RESULTS – TOURIST EXPENDITURE IN JORDAN (2019-2025, 2030) (US$ million)

Generating Market	2019	2020	2021	2022	2023	2024	2025	2030
Africa	117	39	79	110	117	125	133	181
Americas	352	149	297	407	434	462	492	672
Asia and the Pacific	302	107	233	335	356	379	404	552
Europe	796	323	738	1,090	1,160	1,235	1,315	1,797
Middle East	2,132	763	1,626	2,309	2,458	2,616	2,785	3,808
Rest of World	2,087	1,049	1,740	2,167	2,307	2,455	2,614	3,573
TOTAL	**5,786**	**2,429**	**4,713**	**6,417**	**6,831**	**7,272**	**7,742**	**10,584**

APPENDIX D: KEY SOURCES

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