Improving the Resilience of Tourism in Al-Quds: The Way Forward for a Competitive Destination Management
HOŞGELDİNİZ
WELCOME
Outline

1. Purpose
2. Methodology
3. Findings of desk study
4. Opinions of Tourists, International Tour Operators, Local Stakeholders
5. SWOT Analysis
6. Value Chain Analysis
7. Benchmarking Analysis
8. Needs Assessment
9. Road Map and Policy Recommendations
Purpose

Identify characteristics of Al-Quds as a destination

Make an inventory of supply

Define actual and potential demand

Explore environmental factors, analyze tourism value chain, identify stakeholders and their relationships

Make an assessment of needs for Al-Quds tourism

Suggest a road map covering strategies and an action plan
Methodology

- Literature Review
- Observations and Mystery Shopping: Replaced with In-Depth Interviews and Social Media Analysis.
- Interviews and Surveys
- Stakeholder Workshops
Findings: Tourism Trends

Change in Number of Guests and Nights

Source: By authors own, based on the data by PCBS
* Data before 2012 include both West Bank and Gaza, while the 2012 and later relate only to West Bank.
** Data for 2010 could have not been found.
Findings: Tourism Trends

Change in Average Length of Stay

Source: By authors own, based on the data by PCBS

* Data before 2012 include both West Bank and Gaza, while the 2012 and later relate only to West Bank.
** Data for 2010 could have not been found.
Findings: Tourism Trends

**Change in Number of Room and Beds**

*Source: By authors own, based on the data by PCBS*
Findings: Tourism Trends

Source: By authors own, based on the data by PCBS
Findings: Tourism Trends

Average Expenditure per tourist in Jordan, Palestine, and Israel (in USD)

Source: By authors own, based on the data by UNWTO (various publications)
Findings: Tourism Trends

Source: By authors own based on the data by Israel Ministry of Tourism (2017, 2018, 2019)
Findings: Tourism Trends

<table>
<thead>
<tr>
<th>Purpose of Visit</th>
<th>Frequency</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Religion and pilgrimage</td>
<td>13</td>
<td>39.4</td>
</tr>
<tr>
<td>Recreation and holidays</td>
<td>14</td>
<td>42.4</td>
</tr>
<tr>
<td>Business</td>
<td>5</td>
<td>15.2</td>
</tr>
<tr>
<td>Visiting relatives or friends</td>
<td>1</td>
<td>3.0</td>
</tr>
</tbody>
</table>
Tourist satisfaction: Most and Least

• My visit to East Jerusalem was exciting (6.27)
• I intend to recommend East Jerusalem to my friends and relatives (6.18)
• Overall, I am satisfied with my experience in East Jerusalem (6.09)
• Sports opportunities and facilities were satisfactory (3.28)
• There were many attractive fairs, festivals and exhibitions to attend (3.24)
• Nightlife/entertainment opportunities were satisfactory (3.19)
Tourist satisfaction: Worth noting

- Web-site of accommodation facilities seemed trustworthy regarding online payments (3.91)
- Quality of urban infrastructure was good (3.97)
- East Jerusalem was clean (3.79)
Comments of International Tour Operators

• In general tourists are highly satisfied about their experience in Al-Quds.

• Infrastructure: Facilities needing refurbishment, congestion in popular sites, streets are not clean and they are dark at night.

• Service quality: Few staff speak foreign languages, training needs of staff and tour guides, improving managerial skills, limited selection of souvenirs.

• Promotion of marketing. False image of insecurity.
• Israel’s policies and actions.
• Easier access to finance is needed.
• Al-Quds is visited mostly for pilgrimage and culture, tourists go to other Palestinian cities for entertainment.
• High seasonality (tours from Muslim countries may fill the gap)
• Industry is losing experienced work force and investments.
• A revitalisation plan after COVID-19 pandemic is necessary.
• Unique characteristics of the location should be promoted.
• Worldwide promotion under an umbrella organisation is needed
• Tourism is a very effective communication channel for connection with the rest of the world.
A DMO should be established immediately with financial (and technical, if necessary) support of international institutions.

- International financial support should also be provided during the first 5-years for the DMO until it becomes financially sustainable.

Urgent financial support and grant programs should be designed and implemented to eliminate the economic damages of COVID-19 pandemic and to prepare businesses to post-COVID-19 period.

- Programs aiming trainings and physical renovations should be carried out to increase the quality and product/service variety.

Cooperation and training programs should be developed with international educational institutions to increase technical/managerial skills of managers and employees.

- It should be ensured that middle or top-level managers gain experience in international businesses.
- Programs and trainings should be organized in order to increase digital literacy and innovation skills in tourism enterprises.

The survival and development of tangible and intangible "Palestinian identity and culture” should be lobbied within UNESCO and other important cultural institutions.

- Local products/souvenirs would gain more importance in post-COVID-19 period, therefore, strategies should be developed to underline the authenticity and locality of cuisine, souvenirs, architecture, life styles, etc.
# Value Chain Analysis

## General tourism value chain analysis scheme

### Value Chain of Tourist’s Experience

<table>
<thead>
<tr>
<th>1. Pretrip</th>
<th>2. On Trip</th>
<th>3. Post Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Promotion</strong></td>
<td><strong>Tourism assets</strong></td>
<td><strong>Support services</strong></td>
</tr>
<tr>
<td>Travel Agents</td>
<td>Cultural assets*</td>
<td>Information centers</td>
</tr>
<tr>
<td>Tour Operators</td>
<td><strong>Leisure and excursions</strong></td>
<td><strong>Rating</strong></td>
</tr>
<tr>
<td><strong>Transportation</strong></td>
<td><strong>Vacation packages</strong></td>
<td><strong>R&amp;D Institutions</strong></td>
</tr>
<tr>
<td>Airlines</td>
<td>Shows</td>
<td>Guidance to tourism businesses</td>
</tr>
<tr>
<td>Cruises and Ferries, boats</td>
<td><strong>Tourism guides’ organizations</strong></td>
<td>Certification and Control Institutions</td>
</tr>
<tr>
<td><strong>Accommodation</strong></td>
<td><strong>Arty &amp; cultural assets</strong></td>
<td><strong>Grocery shops/retail outlet</strong></td>
</tr>
<tr>
<td>Hotels</td>
<td><strong>Tourism Packages</strong></td>
<td>Internet/telephone</td>
</tr>
<tr>
<td>Apartments</td>
<td><strong>Internet</strong></td>
<td><strong>Security and medical services</strong></td>
</tr>
<tr>
<td>Cafés and patisseries</td>
<td><strong>Internet</strong></td>
<td><strong>Bank &amp; exchange</strong></td>
</tr>
<tr>
<td><strong>Creative Industries</strong></td>
<td><strong>Guides and escorts</strong></td>
<td><strong>Technology shops/imports</strong></td>
</tr>
<tr>
<td>Handicrafts and Arts shops</td>
<td><strong>Excursion and event operators</strong></td>
<td><strong>Laundry, oil station, hairdressers etc.</strong></td>
</tr>
<tr>
<td><strong>Tourism</strong></td>
<td><strong>Maintenance</strong></td>
<td><strong>Construction, Energy, Water, Waste, Education, Communications, Public security and health</strong></td>
</tr>
<tr>
<td>Ministry of Transport</td>
<td><strong>Coordination</strong></td>
<td>Support Institutions: Ministry of Tourism, Trade, Commerce, Transport, Culture, Interior Affairs, Environment etc. Promotion Organization, Chamber of Commerce; Banks, Licensing and Standards developing NGOs, CBOs</td>
</tr>
<tr>
<td><strong>Food &amp; Drink</strong></td>
<td><strong>Food producers</strong></td>
<td><strong>Support Services</strong></td>
</tr>
<tr>
<td>Restaurants</td>
<td></td>
<td><strong>Rating</strong></td>
</tr>
<tr>
<td><strong>Pharmaceuticals</strong></td>
<td></td>
<td><strong>R&amp;D Institutions</strong></td>
</tr>
<tr>
<td><strong>Natural assets</strong></td>
<td></td>
<td>Guidance to tourism businesses</td>
</tr>
<tr>
<td><strong>Local bazaars</strong></td>
<td></td>
<td>Certification and Control Institutions</td>
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</tr>
</tbody>
</table>
Tourism / Travel Agents and Tour Operators: HLITOA (50 Tour Operators), PSTTA (60 Professional Members), JTC: Enjoy Jerusalem

Media: 215 organisations – TWiP

CSOs: Associations, Unions, Chambers, Communities: ATHC, HLITOA, PTTA, NEPTO, AHA, JTC, TAJ

Advertisement and Promotion Agencies: visitpalestine.ps ; www.travelpalestine.ps ; atg.ps

Public Administration: Many in Palestine – virtually none in Al-Quds
Value Chain Analysis: On-trip Actors

Accommodation Facilities: 5-star: 2; 4-star: 1; 3-star: 1; no-star: 4; Hostels and guesthouses

Food & Beverage Facilities: More than 50 registered restaurants

Tour Guides: 83 guides registered members of ATGU with various language skills

Arts Crafts and Souvenirs: 75 shops listed in PASSIA

Museums, Festivals & Cultural Events: Some need of improvement for festivals and events
Value Chain Analysis: Post-trip Actors

Not many in terms of measuring tourist satisfaction, certification, quality monitoring and assurance.
Value Chain Analysis

- All actors in the value chain are present and active
- Experience in collaboration
- Need for establishing an inclusive platform (restructuring existing ones) for destination management to fill the gap in the post-trip section of the value chain (quality assurance – certification)
Benchmarking: Drawing Lessons from others

Three examples having similar characteristics. Destination of pilgrimage, history of political and/or military conflicts, religious and ethnic diversities.

1. Shri Badarinath Dhaam (Pilgrimage Destination on the Route of Char Dhaam Yatra) India,
2. Sri Pada (Adam’s Peak) in Sri Lanka
Lessons Learned:

All three sites are successful in attracting a large number of tourists and creating high revenues. They maintain, protect and renovate physical infrastructure in the touristic sites, invest in infrastructure for transport, accommodation, creating new activities and promotion of their destinations. They more or less find solutions to share the revenues with local people despite of their ethnic and religious diversity. All destinations have long term development strategies to implement projects.

DMOs have been active over a long period of time, they attract investors, advocate infrastructure investment, regulate the industry in general terms.
Needs Assessment:

- Infrastructural Needs
- Service quality
- Finance
- Promotion and marketing
Governing body working towards improvement of tourism in Al-Quds.

Physical infrastructure:
- Facilities: renovation and refurbishment, increasing capacity, introducing local cuisine
- Urban Infrastructure: street lighting, repair, cleanliness

Entertainment facilities, festivals and events
Needs Assessment: Service Quality

Human resources development (for staff and managers)
Variety of services (local food and traditions).
Better informed tour guides
More variety / better presentation of arts and crafts.
Improved Web Sties
Needs Assessment: Finance

Investments for renovation, refurbishment, improvement of services.

Surviving COVID-19 pandemic.

Need for attracting international investments
Holistic approach to marketing Al-Quds as destination.
Establishing good working relations with international organisations and international media.
Organisation of info-tours.
More user friendly and up-to-date promotion web sites and mobile applications
Road map: An (in)formal structure

**Destination Management Office (DMO) – Al-Quds Tourism Board**

Participative:

- Private sector representatives (all sub-sectors)
- Religious institutions
- Universities
- Chambers
- Support sectors (ICT, business support organisations)
- NGOs representing local citizens
Destination Management Office (DMO) – Al-Quds Tourism Board

Well Organised:

• General Assembly
• Executive Board
• Secretariat (CEO, promotion, statistics, business development)
• Advisory Boards
• Working Groups
Destination Management Office (DMO) – Al-Quds Tourism Board

Mandate:
• Strengthening cooperation between businesses
• Planning and strategy development
• Increasing the variety and quality of products and services,
• Promoting the Al Quds destination
• Encouraging investment to Al Quds tourism sector
• Developing human resources
• Research and product development
• Searching "appropriate" financial resources for the partners of Al Quds tourism and its operational duties
• Project development and implementation
Road map: Diversification of Services

Going beyond pilgrimage:

- Thematic tours (nature, local culture, local cuisine)
- Creating cultural and historic narratives
- Daily tours for expats
- Enriching souvenirs (sustainable souvenirs)
- Street arts, festivals, art performances
Road map: Improving quality: Human Resources

• Education and training for tourism staff
• Awareness raising among citizens
• Public training programmes (language, skills)
• Collaboration with universities and other education institutions.
Road map: Improving quality: Renovation

Renovation / refurbishment of facilities
• Hotels
• F&B Facilities
Re-opening businesses
Road map: Improving quality: Urban Services

- Recreation areas
- Environment friendly /trendy transportation
- Art performance areas
- Street guiding and signages
- Street lighting
Road map: Improving quality: Promotion

Promotion and marketing

• Effective use of social media
• Websites integrated with mobile applications
• Targeting new markets (Asia, Muslim countries)
• Aggressive campaigns
• Correcting false impressions (safety)
• Participation to international fairs and events
• Collaboration with neighbouring destinations for promotion
Vision & Mission

Feel the genuine spirituality, humanity and authenticity of the Palestinian citizens and the places.

Assuring that Al Quds provides quality visitor experiences and making it a sustainable and quality destination worldwide, by attracting social and physical investments, to reach the main purpose of improving the socio-economic life quality of all Palestinian citizens and stakeholders of the community.
Thank you

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THANK YOU