

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

COMCEC COORDINATION OFFICE
April 2021



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Table of Contents

List of Tables.....	V
List of Figures	VI
Message from the CCO Director General	1
Preface	2
Foreword	3
1. Executive Summary.....	4
2. Introduction	14
3. Methods of the Study.....	18
4. Background Information on Palestine and Al Quds.....	22
4.1. Palestine	22
4.1.1. History	22
4.1.2. Economy.....	28
4.2. Al Quds	31
4.2.1. Economy.....	33
4.3. Tourism	34
4.3.1. National Figures	40
4.3.2. Figures of Al Quds and Comparisons with Other Palestinian Regions	51
5. Supply Analysis and Demand Analysis.....	58
5.1. Tourist Opinions.....	58
5.1.1. Analysis of Comments on Online Reservation Sites.....	58
5.1.2. Performance Analysis.....	63
5.2. Opinions of Tourism Stakeholders.....	70
5.2.1. Opinions of International Tour Operators	71
5.2.2. Opinions of Local Stakeholders	75
5.3. Environmental Analysis: SWOT and PEST Analyzes and TOWS Matrix...87	
5.3.1. Strengths	88
5.3.2. Weaknesses	89
5.3.3. Opportunities	93
5.3.4. Threats	94
5.3.5. Horizontal Issue: COVID-19 Pandemic.....	96
6. Value Chain Analysis	104
6.1. Tourist's Experience Approach	105

6.1.1.	Pre-Trip (Decision/Planning/Travel Organization and Booking) .	105
6.1.2.	On Trip	107
6.1.3.	Post – Trip	107
6.2.	Value Chain of Tourism in Al Quds	108
6.2.1.	Pre-Trip Actors.....	109
6.2.2.	On – Trip Actors.....	115
6.2.3.	Post Trip	118
6.3.	Clues from Tourism Value Chain Analysis in Al Quds towards a DMO Structure	119
7.	Benchmarking.....	122
7.1.	Shri Badarinath Dhaam (Pilgrimage Destination on the Route of Char Dhaam Yatra)	124
7.1.1.	Political Condition.....	124
7.1.2.	Economic Situation	125
7.1.3.	Social Structure	130
7.1.4.	Technical/Technological Infrastructure	130
7.1.5.	Organization of Destination Management in Uttarakhand State...	130
7.2.	Sri Pada	132
7.2.1.	Political Condition.....	132
7.2.2.	Economic Situation	133
7.2.3.	Social Structure	137
7.2.4.	Organization of Destination Management in Sri Pada and Sri Lanka	138
7.3.	Santiago de Compostela (Old Town)	139
7.3.1.	Political Condition.....	139
7.3.2.	Economic Situation	141
7.3.3.	Social Structure	143
7.3.4.	Organization of Destination Management in Santiago de Compostela.....	144
7.4.	Results of the Benchmarking Analyses.....	145
7.4.1.	Politic.....	145
7.4.2.	Economic.....	146
7.4.3.	Social	146
7.4.4.	Technical / Technological	147
7.5.	Lessons for Al Quds	147
8.	Needs Assessment	151
8.1.	Infrastructural Needs	151

8.2. Needs for Service Quality	153
8.3. Financial Needs	157
8.4. Promotion and Marketing Needs.....	157
9. The Road Map	160
9.1. Governance.....	160
9.1.1. Performance Indicators.....	167
9.2. Diversification of Tourism Services	168
9.3. Quality	172
9.3.1. Human Resources and Service Quality	172
9.3.2. Renovation of Facilities.....	174
9.3.3. Urban Services	174
9.4. Promotion and Marketing.....	175
10. Conclusion.....	182
References	187
Annexes	197
Annex 1 Questionnaire Form	197
Annex 2 Results of Regression Analysis	200
Annex 3 Service types provided by HLITOA members	201
Annex 4 Agents registered in HLITOA, travelpalestine.ps and PSTTA	202
Annex 5 Media Organizations in Palestine	205
Annex 6 CSO types and names in Palestine	206
Annex 7 Supporter bodies to VisitPalestine.....	208
Annex 8 Institutions in Palestine.....	209
Annex 9 Accommodation facilities in Palestine	211
Annex 10 F&B Facilities in East Jerusalem.....	213
Annex 11 List of arts & crafts facilities/shops.....	214
Annex 12 List of festivals and museums	215

List of Tables

Table 1 Sectoral distribution of Al Quds Employment.....	34
Table 2 Service facilities in Palestine	41
Table 3 Contributions of economic sectors to East Jerusalem GDP in 2000-2002 and 2014-2016	51
Table 4 Ratio of tourists staying at Israeli hotels and visiting Al Quds	54
Table 5 Service facilities in Al Quds	54
Table 6 Average length of stay by region.....	57
Table 7 Demographic profile of respondents	63
Table 8 Information about Al Quds visit of respondents.....	65
Table 9 Means and Modes of Responses by Groups of Items.....	65
Table 10 SWOT and PEST Analyzes	101
Table 11 General tourism value chain analysis scheme.....	106
Table 12 Possible actors in tourism value chain of the project area	108
Table 13 Actors of the first phase	109
Table 14 Actors of on -trip stage in the project area	116
Table 15 Language list of ATGU	117
Table 16 Roles of Organizations in Al – Quds Destination.....	121
Table 17 Details of PEST analysis applied to selected destinations.....	124
Table 18 Tourist Arrivals in Uttarakhand (millions).....	127
Table 19 Type, Number and Share of the Accommodation Facilities in Uttarakhand State.....	128
Table 20 Number and ratio of registered tour operators in Uttarakhand state.....	128
Table 21 Basic economic indicators.....	133
Table 22 Shares of economic activities in employment	134
Table 23 Summary of updated tourism data (2019).....	134
Table 24 Some indicators of Galicia	141
Table 25 International tourist arrivals	142
Table 26 Population of Galicia.....	143
Table 27 Summary of the characteristics of the example destinations.....	150
Table 28 Principal activities/projects to improve Al Quds Tourism.	179

List of Figures

Figure 1 Illustration of process and methodology of the study	21
Figure 2 Change in population of Palestinians and Jews in Palestine	24
Figure 3 Proportion of Sectors in total GDP of the West Bank and Gaza	29
Figure 4 GDP Changes in West Bank and Gaza.....	30
Figure 5 Population of Al Quds	32
Figure 6 Changes in population of Al Quds by religions	32
Figure 7 Tourist attractions of Palestine	36
Figure 8 Change in Number of Guests and Nights	42
Figure 9 Change in Average Length of Stay	42
Figure 10 Change in Number of Hotels.....	43
Figure 11 Change in Number of Room and Beds.....	43
Figure 12 Change in occupancy rates.....	44
Figure 13 Distribution of tourists by Nationality.....	46
Figure 14 International Tourist Arrivals in Jordan, Palestine and Israel.....	47
Figure 15 International Tourist Revenues of Jordan, Palestine and Israel	48
Figure 16 Average Expenditure per tourist in Jordan, Palestine and Israel (in USD)	48
Figure 17 The Travel Purposes of Tourists Visiting Palestine	49
Figure 18 The main purpose of tourists visiting Israel.....	50
Figure 19 Ratio of tourists visiting Palestinian territories (in Israel records).....	50
Figure 20 Ratio of daily visitors visiting Palestinian territories (in Israel records)	50
Figure 21 Number of Hotels by Region in Palestinian Territories	52
Figure 22 Number of Rooms by Region	52
Figure 23 Number of Beds by Region.....	53
Figure 24 Number of Tourists by Region in Palestine	56
Figure 25 Share of Tourist Arrivals by Region in Palestine.....	56
Figure 26 The main purpose of visits to Al Quds	57
Figure 27 Reviews of tourists who stayed at accommodation facilities in Al Quds	62
Figure 28 Remarks from Tourists and Palestinian and International Tourism Partners.....	86
Figure 29 TOWS Matrix	103
Figure 30 Location of Char Dhaam Yatra.....	125
Figure 31 Access to the Pilgrimage Areas	127
Figure 32 Location of Sri Pada.....	133
Figure 33 Trends in the number of tourists and tourism revenues.....	135
Figure 34 Distribution of tourists by purposes of visit (%).....	135
Figure 35 Occupancy rate of accommodation	136
Figure 36 Location of the area.....	140
Figure 37 Trends in GDP of Galicia.....	141
Figure 38 Distribution of tourists by purposes of visit (%).....	143
Figure 39 Needs Assessment	159
Figure 40 “Proposed” Model for Al Quds Tourism Board.....	166
Figure 41 Use of sustainable souvenirs for society, the economy and the environment.....	170

List of Abbreviations

AHA	The Arab Hotel Association
ATG	Alternative Tourism Group
ATGU	Arab Tourist Guides Union
ATHC	Al-Quds Tourism and Heritage Council
ATTU	Arab Tourist Transport Union
BC	Before Christ
CBO	Community-Based Organization
CCO	COMCEC Coordination Office
COMCEC	Standing Committee for Economic and Commercial Cooperation of the Organization of Islamic Cooperation
DESU	Directorate of Economics & Statistics Planning Department
DMO	Destination Management Organization
DoP	Declaration of Principles of Interim Self-Government
EU	European Union
e-WOM	Electronic Word-of-Mouth
F&B	Food and Beverage
FDI	Foreign Direct Investments
FIT	Free Independent Travelers
GDP	Gross Domestic Product
HCEF	The Holy Land Christian Ecumenical Foundation
HLITOA	Holy Land Incoming Tour Operators Association
ICC	International Criminal Court
ICT	Information Communication Technology
INE	Instituto Nacional de Estadística
IPA	Importance Performance Analysis
IPCA	Importance Performance Competitor Analysis
JACCI	The Jerusalem Arab Chamber of Commerce and Industry
JTC	Jerusalem Tourism Cluster
MICE	Meetings, Incentives, Conferences and Events
MoNE	Ministry of National Economy
MoTA	Ministry of Tourism and Antiquities
n.d.	Not dated
NCT	National Capital Territory
NEPTO	Network for Experimental Palestinian Tourism Organization
NGO	Non-Governmental Organization
OECD	The Organization for Economic Co-operation and Development
PASSIA	Palestinian Academic Society for the Study of International Affairs
PCBS	Palestinian Central Bureau of Statistics
PIPA	Palestinian Investment Promotion Agency
PLC	Palestinian Legislative Council
PLO	Palestine Liberation Organization

PNA	Palestinian National Authority
PPP	Public Private Partnership
PSTTA	The Palestinian Society of Tourist and Travel Agents
R&D	Research and Development
SESRIC	The Statistical, Economic and Social Research and Training Centre for Islamic Countries
SGA	Strategic Government Advisory
SLMTDCRA	Ministry of Tourism Development and Christian Religious Affairs
SLTDA	Sri Lanka Tourism Development Authority
SME	Small and Medium Enterprise
SWOT	Strengths, Weaknesses, Opportunities, Threats
TB	Tourism Board
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
USA	United States of America
USD	American Dollar
USP	Unique Selling Proposition
UT	Union Territories
WTTC	World Travel and Tourism Council

MESSAGE FROM THE CCO DIRECTOR GENERAL

COMCEC Coordination Office has initiated the COMCEC Al-Quds Program as a sign of solidarity with Palestine considering the current situation and special conditions there, especially in Al-Quds Al-Sharif, and the resolutions of the recent Extraordinary Islamic Summits on Al-Quds.

The Program aims at protecting the cultural heritage of Al-Quds through, among others, emphasizing the importance of its Islamic-Arab identity; maintaining and restoring the historical and archaeological structure; rehabilitating touristic architecture of the national cultural identity and helping the development of cultural tourism. Implemented in collaboration with the Ministry of National Economy of Palestine, the program consists of several phases and projects to be carried out between 2020 and 2022.

In this regard, the first project of the Program has been initiated in 2020 in collaboration with the Ministry of National Economy of Palestine and Al-Quds Tourism and Heritage Council (ATHC). The first project of the Program aimed at analysing the tourism infrastructure and developing a tourism destination roadmap for the city. The present report titled “Improving the Resilience of Tourism in Al-Quds: The Way Forward for a Competitive Destination Management”, which was conducted by a competent research team, is an outcome of this project.

The report reviews the tourism trends in Al-Quds, analyses the views of tourists, international tour operators, and local stakeholders, presents an environmental analysis, analyses the tourism value chain in Al-Quds, makes comparisons with benchmarking destinations and concludes with a general needs assessment of tourism sector in Al-Quds. It ultimately provides a roadmap and set of policy recommendations that may be useful for policy-makers and other relevant tourism stakeholders in Al-Quds Al-Sharif for future use. The Study also provides a basis for the projects to be financed and implemented under the Grant Scheme for Supporting Non-Profit Organizations within the framework of the COMCEC Al-Quds Program.

Expressing our special thanks and gratitude to Ministry of National Economy of Palestine and other stakeholders in Al-Quds Al-Sharif, especially Al-Quds Tourism and Heritage Council (ATHC) for their kind support, we sincerely hope that this study would reach its objective with the support of the Government and People of Palestine as well as the OIC Member Countries, institutions and other international stakeholders.

Fatih ÜNLÜ
Director General
COMCEC Coordination Office

PREFACE

Since its inception in 1984, as the host country holding the chairmanship, the Republic of Turkey has been strongly supporting COMCEC in its efforts for enhancing economic and commercial cooperation and finding solutions to the common development challenges in the OIC Member Countries. Throughout these 37 years, COMCEC has launched various programs and projects for contributing to the social and economic development in the member countries.

Moreover, Turkey, after hosting the 13th Islamic Summit Conference in 2016, has also conducted very active OIC term presidency between 2016-2019 through commencing new initiatives and establishing new bodies under the umbrella of the OIC for enhancing the solidarity among Islamic Ummah as well as taking immediate actions to the challenges and major issues in the Islamic World especially regarding Palestine. Among these actions, following the recent developments on the historical status of Al-Quds Al-Sharif in 2017, Turkey, organized the 6th and 7th Extraordinary Islamic Summit Conferences in 2017 and 2018 respectively to **“reaffirm the centrality of the Cause of Palestine and Al-Quds Al-Sharif to the Muslim Ummah”**.



COMCEC Ministerial Sessions also “invited the Member Countries to encourage their relevant institutions, tourism companies and tour operators etc. to further their efforts through, among others, organizing promotion campaigns and additional tours to Quds al-Sharif for supporting Palestinian residents of Al-Quds and to demonstrate solidarity with them”. For embodying this support and the relevant resolutions of the recent Extraordinary Islamic Summits, initiation of COMCEC Al-Quds Program bears a particular importance towards improving the socio-economic conditions of the people of Al-Quds by bolstering Al-Quds Al-Sharif, the apple of the eye of the Islamic world, as a major tourism destination. During the opening speech of the 36th Session of the COMCEC, His Excellency Recep Tayyip Erdoğan, the President of the Republic of Turkey and Chairman of the COMCEC, also highlighted the significance of this program for improving the welfare of our Palestinian brothers and sisters.

This report, which is prepared under the first project of the Al-Quds Program, offers an insight and provides guidance for policy makers, business leaders and civil society as well as the upcoming projects to be implemented under the Program.

In this regard, in my capacity as the President of Strategy and Budget of the Presidency of the Republic of Turkey, which is responsible for the secretarial services of COMCEC, I would like to express my heartfelt thanks and appreciation to everyone who contributed to realization of this important project, particularly His Excellency Khaled OSAILY, Minister of National Economy of the State of Palestine the main implementation partner in Al-Quds, Al-Quds Tourism and Heritage Council (ATHC) and the research team who conducted this important Study.

İbrahim ŞENEL
President of Strategy and Budget
Presidency of the Republic of Turkey

FOREWORD

Jerusalem is one of the holiest places in the world and a site of major significance for the three largest monotheistic religions: Judaism, Islam and Christianity. The Palestinian government is keen to improve the competitiveness of the Palestinian economy especially the tourism sector, which was the most negatively affected by the Corona Virus pandemic. In this regard, socio-economic development programs are needed to empower the people in the city and to enable them to benefit from East Jerusalem's comparative advantage as an international tourist destination for religious services and other kinds of tourism.



Boosting tourism sector is vital to long-term Palestinian economic growth, since the city of Jerusalem is of paramount spiritual significance for Muslims, Christians and Jews. Hence, the study, which aims to support the tourism sector, will benefit and support the city's residents to withstand the occupation policies and will preserve the Palestinian Arab and Islamic identity of the city.

The importance of the study lies in the fact that it has conducted a comprehensive evaluation of the tourism situation in Jerusalem, in terms of strengths and weaknesses, needs, development suggestions, organization and management, comparison with similar places, etc. In our perspective, we believe that the findings and results of this study are of high importance. It demonstrates that despite the difficult and challenging conditions the city is experiencing due to the political situation of its "occurrence under occupation", there is still a lot to be done to develop the tourism sector, through a large number of development and improvement suggestions concluded from the study, which would be considered as a roadmap. This roadmap could be used by policy makers in Palestine for future plans to develop socio-economic development programs to support the tourism sector in Jerusalem.

I would like to extend my sincere gratitude to Dr. H. Melih ARAL and his team who prepared this informative and valuable study in spite of these difficult circumstances; as they were unable to visit the city due to the travel ban measures resulting from the Covid-19 pandemic. I would also like to thank the COMCEC Coordination Office for their great efforts in accomplishing this important work. We, Palestine and CCO, inaugurated the Jerusalem Program in the COMCEC with this valuable and beneficial study.

Khaled OSAILY
Minister of National Economy
State of Palestine



1. Executive Summary

As far as development of tourism is concerned, Palestine is one of the most complex places to be analyzed across the world, because of its cultural, religious and historical importance, as well as its tense political situation. Palestine's unique history not only attracts tourists but also is a source of unrest. Located at the crossroads of three continents and having various topographic features including sandy beaches, the Dead Sea, hot springs, green areas and deserts, Palestine also incorporates locations of unique value in terms of history, culture, and religion. Despite of this high potential and comparative advantage the tourism sector in Palestine has been underdeveloped, mainly due to the limitations imposed by the Israeli government. The jewel of Palestine and the Holy Land is Al Quds which is holy for Muslims, Christians and Jews. Al Quds has world-class historical, archaeological, religious, and cultural assets with more than three thousand years of history and is an important spiritual center for millions of people worldwide. Moreover, the destination benefits mild climate throughout the year and offers an attractive cuisine.

This report has been prepared under a program designed by COMCEC for improving the tourism industry in Al Quds with a special focus on Destination Development and Management for the city. Unfortunately, the study coincided with the COVID-19 pandemic and the analysis which was initially designed to be based on data collection and observations on the field and their elaboration with local stakeholders had to be revised. The current study was conducted using desk study, data collection over the internet and remote interviews with local stakeholders.

Although by de facto, Al Quds is an occupied territory and the Israeli authorities have been systematically enforcing measures to separate Jerusalem from the rest of the West Bank and other Palestinian territories, it is not possible to understand and analyze the socio-economic structure of Al Quds and draw conclusions without considering its cultural and social links with Palestine. Therefore, tourism structure of Palestine is also reviewed in this document.

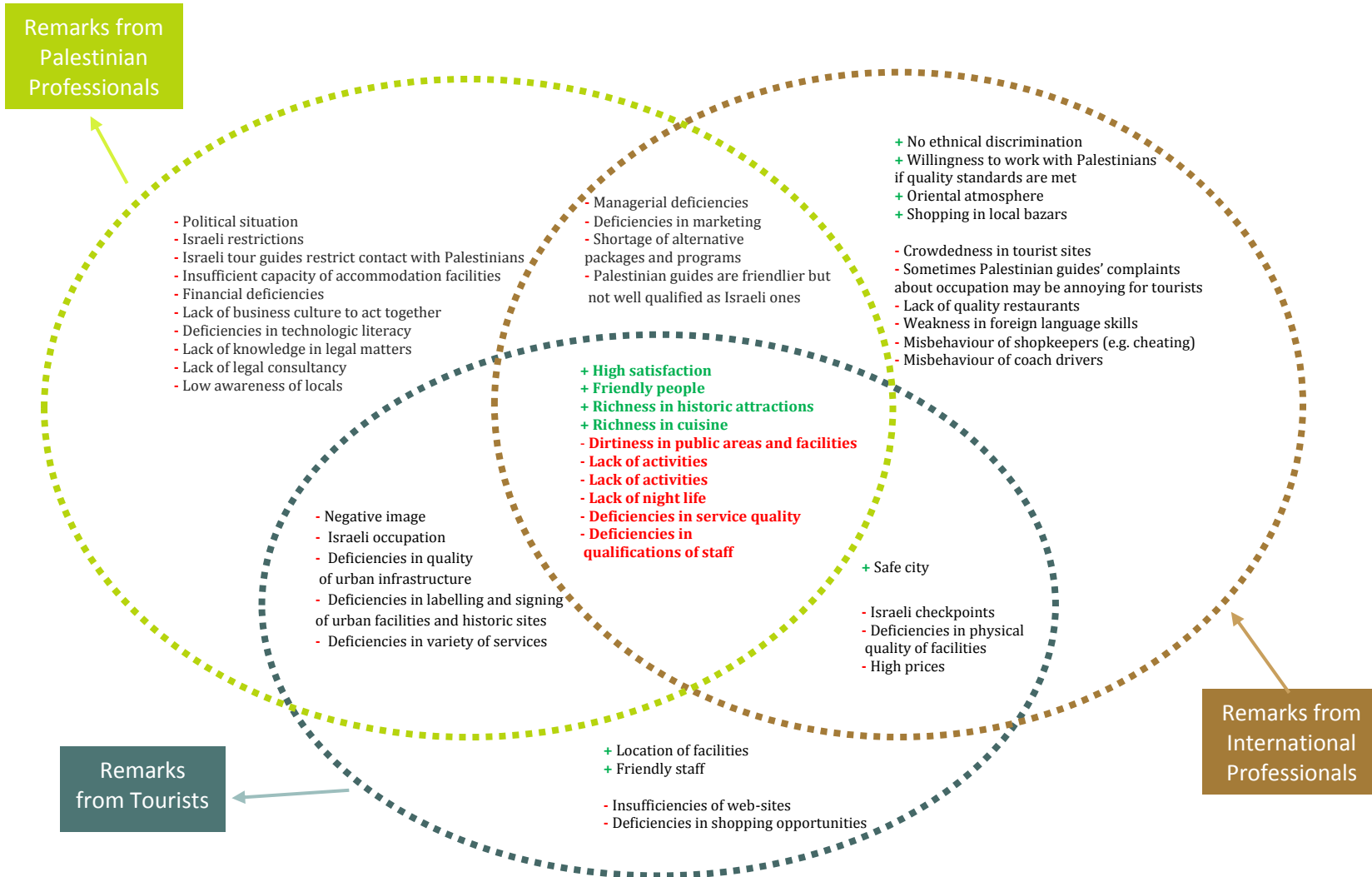
Considered to be an occupied territory according to international law, Al Quds is annexed by Israel in 1968. Following this annexation by the occupation power, links of the Palestinian people and business with the Palestinian authorities have been cut off. Hence, the Palestinian enterprises found themselves in a position with no institutional and strategic support to coordinate their activities in a comprehensive manner. The fact that access to Al Quds is also controlled by Israel imposes many restrictions on tourism activities in the destination which results in many practical problems. The number of Palestinian tour guides fell from 150 to 50 in the last 50 years. Israeli car rental companies do not allow leased vehicles to pass to the Palestinian side. Palestinian tour guides or transportation companies are not allowed to enter Israel, hence they are unable to access Al Quds, since 2000. Tourism businesses and hotels in Al Quds pay taxes to the Israeli administration but neither get much support nor service in return. Palestinian hotel and souvenir shop owners are under very strict restrictions for renovating their facilities or building new ones. Restrictive labor law of Israel increases staff costs putting Al Quds in a disadvantaged position with respect to other destinations in Palestine.

Despite of these facts and conflicts and political/social unrest, all Palestinian territories, and especially Al Quds, host a large number of visitors each year. Tourism in Al Quds and Palestine mainly concentrates on historical and religious areas, and the majority of tourists comes for religious purposes, Christian pilgrims being the largest group. Although there are other types of tourism having small shares in the overall tourism activities, tourism does not have much contribution to wellbeing of the non-Jewish population in Al Quds.

Analyses indicate that tourists mostly complain about the scarcity/absence of activities that they can do in their leisure time after visiting historical sites or during the night, the quality of urban infrastructure and services, cleanliness of facilities and the city in general. On the other hand, visitors are very much satisfied with the historical and cultural sites they visit and enjoy local food. These statements are mostly verified by comments and ratings on tourism internet sites, participants of the online survey and the stakeholders interviewed covering tourism professionals both located in Al Quds and in countries sending visitors to Al Quds.

The positive and negative comments on Al Quds collected from tourists and tourism professionals and a combined SWOT and PEST analysis of the tourism in Al Quds are demonstrated in the Figure and the Table below.

Remarks from Tourists and Palestinian and International Tourism Partners



SWOT and PEST Analyzes

		SWOT			
		STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
PEST	POLITICAL	<ul style="list-style-type: none"> • Familiarity with tourists worldwide • The importance for all Abrahamic religions • Diversity of historical and cultural sites • The highest density of World Heritage Sites • Palestinian identity and attractive oriental lifestyle and architecture of the city 	<ul style="list-style-type: none"> • Lack of /weak ties with regulatory bodies and processes • Weakness in internal and external cooperation • Inefficiency in sectoral organization • Weakness of institutional capacities • Legal framework and public support not effective for Palestinian businesses. • Value of heritage not addressed properly • Futile supports provided by international institutions • Deficiencies in tourism infrastructure • Hesitations for investment due to instability of the sector • Environmental problems such as littering, traffic congestion, water pollution • Lack of promotion and publicity • Inadequate lobbying activities of both private and public sectors • Limited reach to tourists from Arabic countries 	<ul style="list-style-type: none"> • Strong expression of the Organization of the Islamic Cooperation (OIC) that Islamic society is in solidarity with Palestinians and that will continue to support the Al Quds economy and institutions and people in social matters (especially education). • Increase in the number of multinational organizations where Palestinian state is a member • Increase in the numbers of states recognized Palestinian state • Increase in global awareness about rights of Palestinians • Increased support and lobbying of international volunteer groups on Palestine • Increased international support for the Palestinian case • Increased interest of the international media to the region • Developing international cooperation • Opportunities for joint businesses with other countries. 	<ul style="list-style-type: none"> • Continuation of current political conflicts and the lack of peace environment • Continuation of Israeli occupation • Continuation of the absence of Palestinian state institutions in Al Quds • Continuation of Israeli policies neglecting the Palestinian people • Attempts for annihilation of Palestinian identity in Al Quds
	ECONOMIC	<ul style="list-style-type: none"> • Readiness to Halal-travel • Proximity of attractions • Potential for differentiation of tourism products • Locational advantages of facilities • Possibility to have tourism all year round • Presence of talented craftsmen • Competitive prices, compared to Israeli companies • Cooperation with Jordan 	<ul style="list-style-type: none"> • Products mostly limited to religious and historical tourism • High seasonality • Domination of Israeli companies in the market • Inability/deficiencies to access international distribution channels and dependence on Israeli businesses in this regard • Lack of financial resources mainly for further investment and promotion • Heavy tax burdens. • Standstill in tourism activities due to the COVID-19 outbreak 	<ul style="list-style-type: none"> • Rising popularity of the Middle East and Arab countries in the tourism market • Emerging tourist sources from different parts of the world. • Increase in religious tourism • Emerging types of Islamic religious tourism and halal tourism • Increasing number of Muslim tourists • Willingness of international tour operators to work with Palestinian operators if the necessary standards are met 	<ul style="list-style-type: none"> • Price dis-competitiveness against other Palestinian territories • Continuation of the stagnation in tourism sector in case the COVID-19 pandemic continues. • Increase in the tax rates • Fluctuations and declines in the world economy

			<ul style="list-style-type: none"> • Lack of financial management skills of businesses • Need for modernization and physical restoration • Lack of entertainment alternatives for tourists (Games, Festivals) • Lack of awareness among citizens about importance of tourism. • Weakness and foreign dependency in economy. • High unemployment rates • Labor-intensive Economy 	<ul style="list-style-type: none"> • Increasing international funding opportunities to improve social and physical infrastructure 	
	SOCIAL	<ul style="list-style-type: none"> • Strong and sincere hospitality culture • Rich local culture and handicraft • Rich cuisine • Multilingual youth • Low crime rate 	<ul style="list-style-type: none"> • Negative image for security • Low awareness about Israeli legislation system and Laws • Low level of knowledge about legal rights • Difficulties in having proper legal consultancy • Depleted education system due to the practices/policies of the Israeli government • Weaknesses in human resources • Low quality/capacity in labor • Deficiencies in management skills of entrepreneurs/owners • Indifference/resistance of managers/owners to new management/marketing systems 	<ul style="list-style-type: none"> • Diversified demand of “modern” tourists • Widely accepted belief in restructuring tourism industry to be prepared for post COVID-19 period 	<ul style="list-style-type: none"> • Disappearance of the authentic handicrafts, skills and culture of Palestine. • Increase in Islamophobia, and prejudices against Muslims • Possible failure to survive during the COVID-19 outbreak
	TECHNOLOGICAL	<ul style="list-style-type: none"> • Fair infrastructure for Wi-Fi connection for tourists. 	<ul style="list-style-type: none"> • Low technological capacity • Inefficient use of technology • Dependency to Israeli companies in technology related matters • Deficiencies in websites (no reservation/payment systems) • Inadequate use of internet technologies in both marketing and managerial aspects. • Lack of technological innovation 	<ul style="list-style-type: none"> • Increased/diversified technological channels that could be used for promotion and marketing • Presence of variety of service providers and online payment gateways 	

Al Quds accommodates nearly all relevant actors in the value chain. There are considerable number of tour operators to organize tours and considerable number of media organizations for promotion. CSOs and professional organizations had successful achievements to increase added value of the tourism sector for adopting a common target for the development of tourism sector in East Jerusalem. Accommodation facilities which are among the most important actors in the tourism value chain are present and there are sufficient number of food and drink serving points making day trips easy especially for those following the route of Holy Lands. Although decreasing in number, there are Palestinian tour guides in East Jerusalem who are friendly and easygoing. Al Quds can offer several types of local arts and crafts products to visitors. Most popular of them are olive wood, mother of pearl, embroidery, pottery & carpets and olive oil soap, which are produced and sold by local small – size entrepreneurs.

For benchmarking, three destinations having characteristics similar to Al Quds are reviewed. The experience of Shri Badarinath Dhaam (a pilgrimage destination in India), Sri Pada (Adam's Peak – a holy location in Sri Lanka), and Old Town of Santiago de Compostela (a holy location in Spain) shows that it is possible to attract large number of tourists and increase tourism revenues at sustainable levels in spite of ethnic and religious diversities and political tensions by investing in infrastructure, transport, accommodation, and by diversifying tourism activities in addition to belief tourism. All these destinations owe this success to operations of effective Destination Management Organizations (DMO) that have been operational over long time periods.

Based on the above findings, a comprehensive needs assessment was conducted, and the following points are identified:

Basically, the lack of an organizational structure is felt intensely. There is a lack of regulatory institution, and consequently, the level of cooperation among leading institutions is not at the desired level. A DMO that can coordinate efforts such as improving the quality of services, and carrying out marketing activities is deemed necessary. This need leads to requirement for investment in physical infrastructure such as renovation of existing hotels and increasing their capacities and/or building or opening new accommodation facilities. Currently, there are some initiatives to form an umbrella organization for Al Quds tourism, and it would be beneficial to transform/complete the structure of these initiatives in a way to integrate/coordinate tourism development. Among those, ATHC is identified as the best candidate to be transformed into a DMO structure. Another need is the variety of tourist attractions especially those that will keep entertaining tourists after sun set. Tourists can walk around historical, cultural and religious places during the day in East Jerusalem, but there is no activity in the evening. Cultural events, exhibitions, concerts, festivals and street entertainment are needed to be organized. Need for improving skills for the employers and employees is also prevalent. Even if businesses employ qualified staff, they need to refresh and update the knowledge and skill levels of employees to increase their proficiency. There is also an urgent need for tourism employees to receive training on the cultural values and elements (assets) of Al Quds and Palestine to gain insights and have a level of consciousness about them. It is also necessary to promote gastronomic elements of the destination.

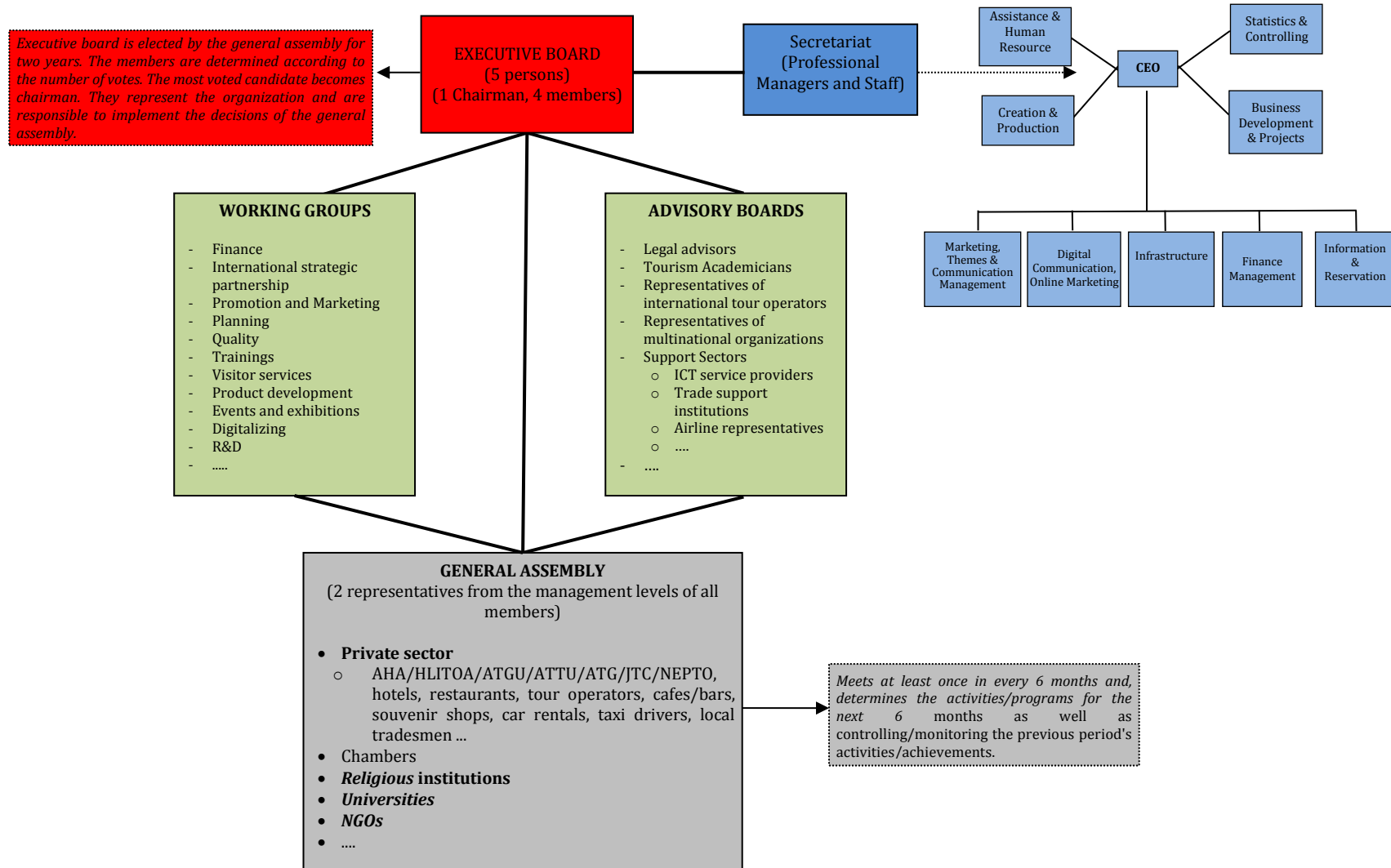
As almost all Palestinian partners emphasized in interviews, financial problems cause further difficulties in developing tourism in Al Quds. This presents a vicious circle faced by all development challenges. Without sufficient resources business cannot be developed and with less business it is never possible to have financial resources for improvement. However, there are mechanisms which can initiate the desired improvement and eventually create financial resources. In the report, a strong DMO structure is proposed as the agency to initiate and guide these efforts.

Major tasks to be undertaken for improvement of tourism in Al Quds can be itemised as follows:

- Review of the “Brand” of Al Quds and redesign it if necessary.
- Diversification of tourism activities to spread the tourism season to a wider time period and to include different members of the local community into tourism.
- Create new themes for tourism such as solidarity/politics/justice
- Support for diversification of souvenirs available in the market
- Extend tourism activities beyond sunset.
- Improve skills of the tourism staff
- Ensure cleaning and sanitation of public spaces, organize campaigns
- Establish some accreditation/certification framework for tourism establishments
- Promote local cuisine
- Encourage use of online booking for the facilities in Al Quds
- Renovate and refurbish facilities
- Advocate and support establishment of recreational areas
- Improve transportation infrastructure, introduce alternative transport such as bicycles.
- Increase virtual visibility of Al Quds in social media
- Analyse and discover new markets
- Conduct aggressive marketing campaigns
- Collaborate with neighbouring destinations

These tasks can be achieved by introducing a participative body that represents all stakeholders in the tourism industry in Al Quds. The structure of the proposed DMO that will act as the Tourism Board is depicted in figure below.

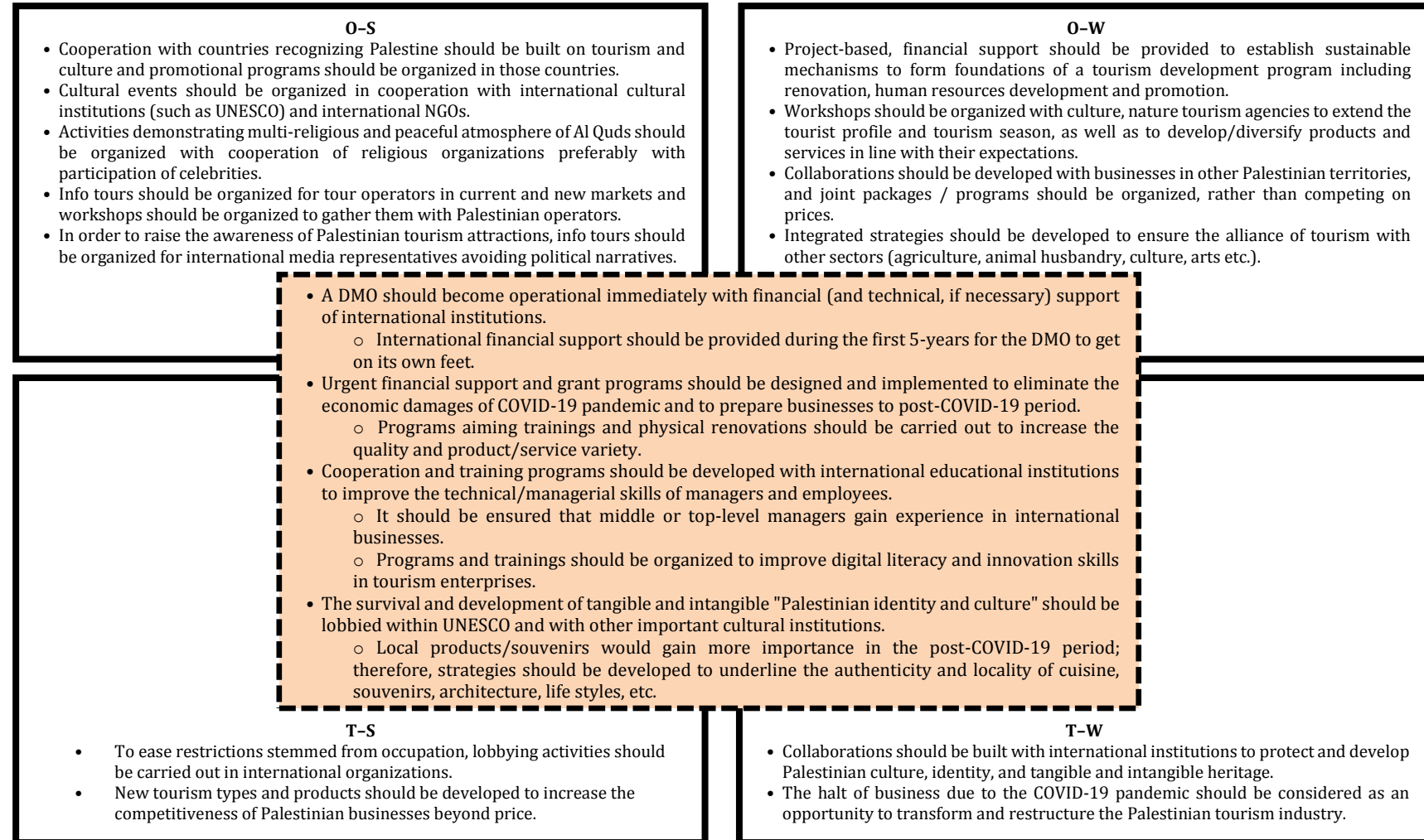
“Proposed” Model for Al Quds Tourism Board



While proposing the structure, care was taken to ensure that the DMO has as much participative structure as possible and managed in a professional manner. The DMO will undertake various responsibilities from accreditation of tourism facilities to lobbying for visa procedures or promotion of the destination in target markets. The organization should have the capacity to utilize alternative financial resources and funds and should have good working relations with donor institutions in this regard. The performance of the DMO should be monitored against a set of performance indicators given in this document.

Based on the SWOT analysis given above and the proposed actions for Al Quds, the TOWS matrix below indicates the actions to be taken to emphasize strengths, overcome weaknesses, leverage opportunities and avoid threats.

TOWS Matrix





Source: IRCICA e-library (<https://library.ircica.org/>)

2. Introduction

Tourism is dynamic and undergoes changes in time and space and mediates a different cultural and social change in different parts of the world¹. In addition to its religious and historical importance, Palestine is one of the most complex places to be analyzed worldwide due to the current political situation². Palestine's unique history not only attracts tourists but also is a source of unrest³. Palestine is located at the crossroads of three continents and has various topographic features including sandy beaches, Dead Sea, hot springs, green areas and deserts⁴. Despite its potential and comparative advantage and diverse religious, historical and natural sites, the tourism sector has been underdeveloped, mainly due to the limitations imposed by the Israeli government⁵.

¹ Cohen-Hattab and Katz, 2001, 166–177.

² SESRIC, n.d.

³ MoNE, 2014.

⁴ Cohen-Hattab and Katz, 2001, 166–177.

⁵ Friedrich Naumann Foundation for Freedom, 2013.

Designing a tourism strategy for Al Quds (which is also widely referred as Jerusalem in many international texts and these two names are used interchangeably in this report) is hard work. Al Quds, which is practically a shared city by two states which have had troubled relations, has particular characteristics, including unique tourist attractions and security issues under military occupation⁶. Similar to all Palestinian territories, Al Quds is surrounded by Israel and entry and exit to the city is controlled by Israeli officers⁷. While Israel tries to justify the occupation with security concerns, Palestinian resistance is largely due to the expansion of settlements in Palestinian territory and the harsh security and repressive policies⁸.

In addition to improving the economy, the development of tourism can be seen as a way of bringing together Palestinian society and strengthening its identity. Consequently, tourism development may indirectly reduce social and economic losses stemmed from Israeli occupation and restrictions⁹. In light of the above, this study aims to build a framework to assure the sustainable and qualified development of tourism in Al Quds.

The jewel of Palestine and the Holy Land, Al Quds is holy for Muslims, Christians and Jews. Al Quds has world-class historical, archaeological, religious, and cultural assets with more than three thousand years of history and is an important spiritual center for millions of people worldwide¹⁰. Moreover, Al Quds has a rich cultural heritage, mild climate throughout the year and attractive Palestinian cuisine¹¹.

COMCEC Coordination Office (CCO) is mandated to design and implement capacity building programs and projects to meet specific needs of economic and social sectors in Member Countries. Considering the critical potential role of tourism for the economy of Palestine and the importance of Al Quds, a destination attracting many visitors from all over the world, CCO has decided to work on a special capacity development program for the tourism industry that focuses on destination development and management for Al Quds.

This report has been prepared to meet the requirements set for the first phase of the Program. This phase is specifically intended for *“analyzing the tourism infrastructure and developing a tourism destination road map for Al Quds”*.

Unfortunately, the study coincided with a period of catastrophic circumstances experienced worldwide. The COVID-19 pandemic drastically affected the daily lives of the world population and economy of the communities. Palestine and Al Quds were no exception. Tourism industry may be affected the worst among all sectors. As reported by United Nations World Tourism

⁶ MoNE, 2014.

⁷ Beinun and Hajjar, 2014.

⁸ Al-Rimmawi and Butcher, 2015, 317 – 335.

⁹ MoNE, 2014.

¹⁰ Al-Rimmawi, 2003, 76-85; Brin, 2006.

¹¹ Jafari, Abdullah, 2019.

Organization (UNWTO), the pandemic resulted in the fall of international tourist numbers by 98% only in the month of May when European countries started to ease lockdown measures. The cost of the pandemic as of May 2020 was already three times deeper than that of the 2009 Global Economic Crisis¹².

With the mobility which has come to a halt, the study was deeply hampered in two different aspects. Firstly, it has become impossible for researchers to travel to the subject area to make observations, discussing with stakeholders and conducting field studies as it was initially planned. Secondly, and more importantly, there was no tourism activity on the field to make observations, no tourists to collect data from and in general the mood of the sector and general public was hardly favoring enthusiasm for a new study. On the other hand, idle businesses provided an opportunity for business owners and led them to rethink their strategies and try to come up with innovative ways to recover from the disaster. The pandemic has a potential to provide an important opportunity to introduce and adopt new strategies and new mechanisms that would pave the way for a more promising tourism environment in Al Quds.

As for everybody else, after a few months from the start of the outbreak, it has become clear that the effects would not disappear in a short period of time and the measures for combatting the pandemic would continue in the foreseeable future. Consequently, the sides involved in the study agreed to modify the methodology by replacing field work with desk studies and online surveys with tourists already visited Al Quds and online interviews with stakeholders. Details of the methodology are given in Section 3.

Section 3 is followed by background information about Palestine and Al Quds. Section 4 especially summarizes the historical background and presents profile of the economy and tourism industry underlining peculiar conditions of the city and the country of Palestine which infiltrate to business life and the whole society threatening to transform many new ideas and initiatives into futile efforts and into virtually unachievable targets.

Section 5 describes the supply side of the tourism industry in Al Quds giving emphasis to current tourism markets, products, and practices, as well as current status of infra-structure and supra-structure. Section 6 presents the Environmental Analysis composed of a combined PEST– SWOT study. Value chain of the industry is also defined under this section.

Moreover, Section 7 identifies some touristic destinations having characteristics similar to those in Al Quds and introduces the history of development of tourism in those sites and its contribution to local economies. Story of these destinations may inspire some actions to be taken in Al Quds allowing to assess the potential for Al Quds and possibly serve as a benchmarking tool to measure the progress achieved through the established structure and proposed projects.

¹² UNWTO, 2020d.

Section 8 is the synthesis of all the analyses presenting the needs for intervention in the sector. Infrastructure, superstructure and supra-structure as well as local capacities are evaluated in this section.

Recommendations, as the result of the study, are presented under Section 9. As part of the recommendations, a Road Map for development of tourism in Al Quds is presented together with recommendations at policy level. Destination Management Organization (DMO) is an important element in the proposed recommendations therefore this section also includes detailed description of the DMO.

At the end of the report, the Conclusion section summarizes the general outcomes of the study and some detailed data is provided in the Annexes.



3. Methods of the Study

Analyzing tourism is strongly associated with having a comprehensive view of the provision of key elements of the tourism industry by destinations. Such provision should be understood from intangible to tangible assets, as well as from historic to on-going social factors. Thus, it is important to have a holistic perspective in which tourism resources range from natural to man-made as well as controllable to uncontrollable. Tangible aspects include, for instance, telecommunication, accommodation, and transportation. Intangible aspects might include, tourism reception services, travel agencies, tourist offices, hire companies and visitor managers. It is also important to consider how mobile populations who visit destination areas consume a tourism product, service, or experience to identify how services are provided. Therefore, the approach is based on the analysis of the delivery of perceived value of tourism, in which different intangible and tangible tourism products are delivered in specific moments of truth of tourists.

The strategic objective of analyzing tourism is to assess the contribution of the tourism sector to the socio-economic process in a region and to identify the direct and indirect effects. Defined as *“the supply of all assets, services and goods to be enjoyed or bought by visitors and occasioned by the journeys of visitors”*¹³, tourism comprises diverse and heterogeneous economic activities. Thus, it is important to delimit, which activities should be considered as supplying goods and services, as well as their product life cycle of them.

The following aspects have crucial role for sound analysis;

- Inventory of existing attractions analyzing current and potential value to tourists based on interest, activity or enjoyment
- Inventory of facilities, services and infrastructure taking into account weaknesses and strengths and possible short, middle and long-term intervention
- Business and legal environment facilitating service delivery
- Overall examination of attractions, accommodations and other facilities
- Analysis of the history of tourism development to have comparative assessment of the performance

¹³Eurostat, 2020.

- Overall analysis of infrastructure and superstructure identifying weaknesses and strengths and possible short, middle and long-term intervention
- Identification of current and potential tourism resources, positioning, unique selling propositions (USPs) and competitive advantages.
- Detailing tourism meta-management at the destination. Enhancing stakeholder involvement, enhancing synergies between stakeholders and sustainable development at the destination.

Understanding environmental analysis as a strategic tool, different external and internal elements can be identified as influential factors over tourism destination performance. For this strategic approach, an analysis of the levels of threats and opportunities of different factors as well as the priorities should be established. The priorities are crucial factors to determine short, middle and long-term objectives in the decision-making process.

Local conditions are key factors for any study, which cover environmental, gender and social activities. An initial mapping of potential impact should be considered within a detailed initial analysis depicting the current state (including preserved areas) based on several local sources and based on objective methods following international standards. For this purpose, the SWOT, PEST and TOWS analyzes are ideal tools, in which not only political, economic, social and technological aspects are considered but also legal and environmental, within a strategic framework aiming at sustainable results in the long-term¹⁴.

Bearing in mind the project outcomes for tourism development in Al Quds, a holistic approach which considers both the people and the planet is proposed. This means that people-centered tourism development and nature conservation are crucial backbones for tourism strategy development, understanding tourism as an effective tool for sustainable economic development. Through appropriate tourism products and services, local communities can be empowered to sustain their business ensuring environment protection in the long-term. Thus, the focus of the study aims at providing practical tools for sustainable tourism business management within a solid and strategic framework. Regarding interlinkages with sustainable tourism, it is important to consider partnerships and cooperation between businesses, public entities and knowledge institutions fostering regional competitiveness and innovation in tourism products and services. The approach is based on the framework of participatory and comprehensive management in which the following points are considered; building a destination management organization, and smart specialization, which is characterized by the identification of strategic areas for intervention based on the analysis of strengths and entrepreneurial discovery processes focusing on sustainable tourism.

Within the scope of the study, firstly, a desk research was carried out. Academic studies and other reports prepared for Palestine and Al Quds were reviewed. Afterwards, statistical data

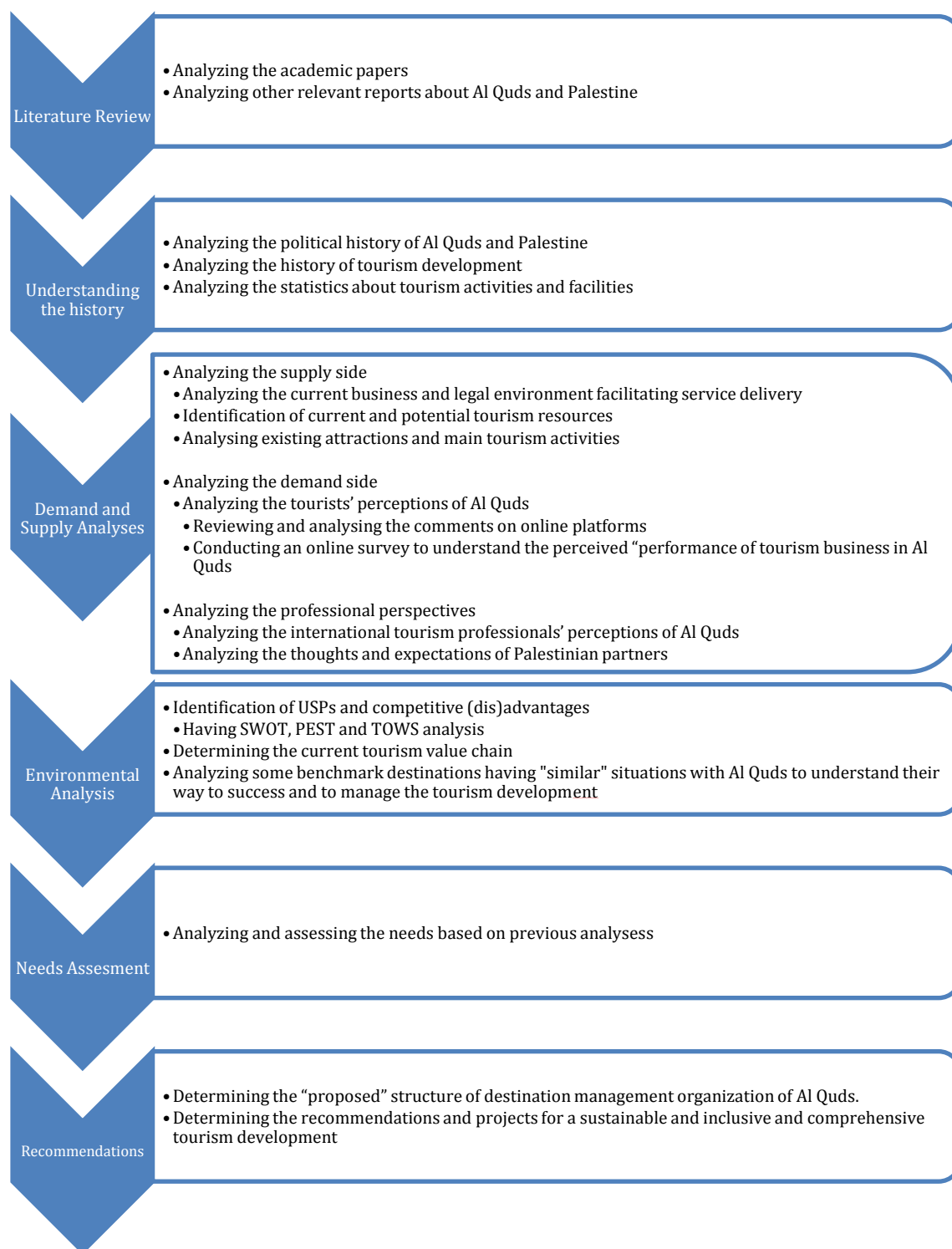
¹⁴ PEST Analysis aims to identify important political, economic, social and technological elements important for the planning efforts while SWOT analysis examines the internal and external factors to identify strengths and weaknesses, as well as opportunities and threats. Based on PEST and SWOT analyses, TOWS focuses to determine the strategies to increase the strengths, to take advantage of opportunities, to reduce weaknesses and to eliminate threats.

were compiled and analyzed in order to understand the history and current situation of tourism in Palestine and Al Quds.

In the next stage, perceptions of tourists visiting Jerusalem were compiled through the opinions expressed on widely used worldwide internet platforms and through an online survey. For the online survey, after negotiations with COMCEC officials and Palestinian stakeholders, it was decided to keep the survey short in order not to discourage potential respondents and to come up with a more efficient way to measure only "tourists' satisfaction with their experiences in Al Quds". During the Online Survey, to ensure worldwide participation, invitations were sent to the customers of businesses in Al Quds. The survey was also disseminated on social media platforms. As the final stage of the data collection process, on-line or telephone in-depth interviews were conducted with local and international stakeholders. Content analysis was used to analyze the interview transcripts. Findings of the study and the conclusions reached were discussed with the stakeholders at various phases of the reporting.

Based on the collected data and its preliminary analysis, the advantages and disadvantages of Al Quds from tourism perspective were identified and a general view of the current situation was developed. All analysis reported in this document are based on these outcomes. Benchmarking analysis was carried out for the areas having similar features to Al Quds and finally, recommendations for a sustainable and inclusive and comprehensive tourism development were derived and the document was finalized with the proposed projects and programs. The process and methodology of the study are illustrated below.

Figure 1 Illustration of process and methodology of the study





Source: IRCICA e-library (<https://library.ircica.org/>)

4. Background Information on Palestine and Al Quds

4.1. Palestine

4.1.1. History

Palestine, for thousands of years, has hosted many civilizations such as Canaan, Babylonian, Assyrian, ancient Greeks, Phoenicians, Romans, Byzantines, Crusaders and Ottomans. Their heritage still lives in today's cities as well as in ancient times and archaeological findings¹⁵.

The earliest archaeological discoveries dates to 7500– 3100 BC and belongs to the Late Chalcolithic Age (Copper Age) and Early Bronze Age¹⁶. From the migration of Canaanites to Palestine at the beginning of the third millennium BC, until the arrival of Cretan tribes in 1200, the region was called the country of Canaan¹⁷.

¹⁵ Fanack, 2020d.

¹⁶ Wasserstein and Dumper, 2019.

¹⁷ Fanack, 2020c.

After 539 BC, the Persians ruled the Palestine for two centuries. In 332 B.C., Alexander the Great annexed Palestine to the Macedonian (Greek) Empire¹⁸. In 116 BC, Hasmonians took their independence, but they gradually turned into vassals of Rome and created Judea province in 6 BC. During the Roman period, Palestine witnessed the birth of Jesus Christ¹⁹, and with the Christianization of the Roman Empire, it became a center for Christianity and attracted many monks and religious scholars.

The Yarmouk Battle was a very critical point in Palestinian history. After that, Palestine went under the Islam rule. After Umayyads (661-750) and Abbasids (750-878); the Turkish states (Fatimids and Great Seljuks) governed Palestine between the mid-900s and 11th centuries. After almost a century of Crusaders' domination, in 1187 the Eyyubid period started. During the Turkish Mamluk period (1250-1517), various building types, especially religious institutions, left their mark on the Palestinian architectural landscape. The city of Al Quds was flourished with khans/caravanserais (roadside inns where travelers can dine, relax and stay overnight), markets (souks) and hammams (bathrooms). From 1516 when the Ottomans triumphed against the Mamluks, to the end of World War I, Palestine was under Ottoman rule²⁰.

Britain invaded Palestine in 1917, after World War I, on 25.04.1920, League of Nations gave Britain authority as the mandate management of the region²¹, in 1921, the British divided region into two, basing the Jordan River, the east became the Emirate of Transjordan, and the west became the Palestine Mandate²².

The first wave of European Jews' immigration to Palestine began in the 1880s and the World Zionist Organization announced that the aim of Zionism was to establish a "national home for the Jewish people" in 1897²³. Also, the British mandate administration encouraged the immigration of Jews to the region and the city population increased. This often led to bloody conflicts between the Palestinians and Jews. For example, in August 1929, 133 Jews and 115 Palestinians were killed, and many were injured²⁴. Jews' immigration to Palestine increased greatly after the Nazis took power in Germany in 1933²⁵, and in 1936 the Palestinians organized a general strike which turned into a rebellion movement against the British authority²⁶.

The conflict was stemmed from both religious differences; and land ownership. Jewry asserts that these lands are their right since Abraham and that these lands provide shelters against

¹⁸ Wasserstein and Dumper, 2019.

¹⁹ Fanack, 2020c.

²⁰ Ibid.

²¹ Cohen-Hattab and Katz, 2001, 166–177.

²² Bein and Hajjar, 2014.

²³ Bein and Hajjar, 2014.

²⁴ Ibid

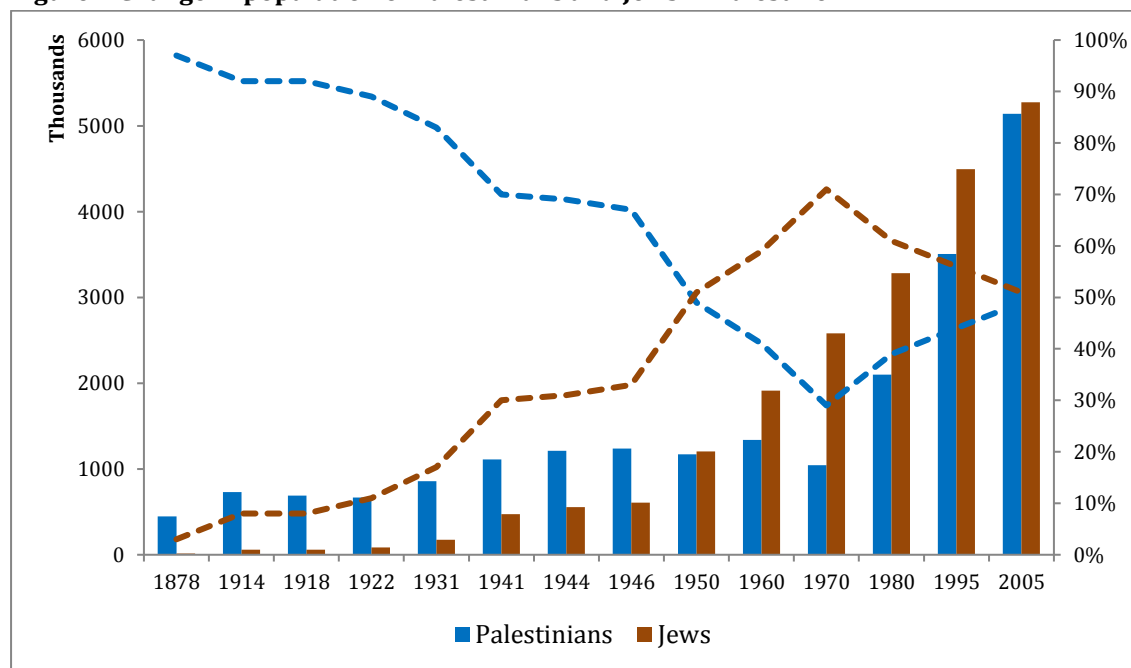
²⁵ Ibid

²⁶ Wasserstein and Dumper, 2019.

European anti-Semitism. The claims of Palestinians are based on the fact that, in conflict territories, they represent permanent residency and demographic majority for thousands of years²⁷.

According to Ottoman records, in 1878 the population of Al Quds, Nablus and Acre districts were 462,465 consisting of 403,795 Muslims, 43,659 Christians and 15,011 Jews. When World War I was commenced (1914), the Palestinian population was 683,000, the Jewish population increased to about 60,000, of which approximately 33,000 were new settlers²⁸. A census by Britain in 1922 showed that the population was almost 750,000 and 11% of it was Jewry²⁹. At the end of 1946, 1,269,000 Palestinians and 608,000 Jews were residing in the mandated territory³⁰. Although, the Palestinian population was the majority in history, the Jewish population, as a result of dense immigration in the English mandate period, gained the majority since the 1950s. In the period after 1970, when the Jewish population reached the highest density, the difference between the population of two communities had started to decrease and population of two communities is almost equal today (Figure 2).

Figure 2 Change in population of Palestinians and Jews in Palestine



Source: By authors own, based on the data by ProCon (2020) and Bein and Hajjar (2014)

²⁷ Bein and Hajjar, 2014.

²⁸ Ibid

²⁹ Bianet, 2017.

³⁰ Bein, and Hajjar, 2014; Bianet, 2017

Britain handed over its responsibility to the United Nations (UN) in 1947 to solve the Jewish-Arab problem. The UN committee proposed to divide the region between Israel and Arab states. The Arab High Committee, Palestinian representatives, rejected the offer, while Jewish representatives accepted it. Partition plan assumed that Jews would migrate to the region incrementally and it left 56.47% of the territory to the Jewry and rest to the Palestinians. The plan also envisaged that the Al Quds and Bethlehem region would be corpus separatum (international region)³¹. At the UN General Assembly on 29 November 1947, the plan was approved by the vote of 33 countries. 13 countries voted against, 10 countries abstained. The plan rejected by the Palestinians has never been implemented and The Palestinian Arab State, proposed by plan, was never established³².

The state of Israel was declared on May 14, 1948, the day Britain left the region, and came into effect the next day³³. Palestinians call May 15 "El Nakba", that is, "Disaster" day³⁴. Since then, Palestinians have been struggling to establish their independent states. A day after the foundation of Israel, Jordan, Egypt, Lebanon, Iraq and Syria waged war on Israel. The war resulted in the split of Palestinian territories into Israel, the West Bank (of the Jordan River) and the Gaza Strip³⁵. While more than 77% of the region passed to Israel, Jordan and Egypt took control of Al Quds and West Bank, and the city of Gaza, respectively³⁶. The war concretized neighborhoods based on ethnicity since the Palestinians escaped from West Jerusalem and the Jews from the Old Town's Jewish quarter³⁷.

In the 1967 war, which took place 3 years after the foundation of the Palestine Liberation Organization (PLO) in Al Quds, Israel seized the Sinai Peninsula from Egypt and the Golan Heights from Syria, addition to the West Bank and Gaza Strip³⁸. After the war, the UN Security Council adopted Resolution 242, asking Israel to withdraw from the territories occupied in the war³⁹. According to the United Nations (UN), the war led 500 thousand more Palestinians to become refugees and to migrate to Egypt, Lebanon, Jordan and Syria⁴⁰. To recover the lands lost in the war in 1967, Egypt and Syria attacked Israel during the Yom Kippur holiday in 1973 and cease-fire was secured with diplomatic interventions of the United States of America (USA), the Soviet Union and the UN⁴¹. After Arafat's speech about a peaceful solution of the Israeli-Palestinian problem in 1974, a peace agreement was signed between Egypt and Israel in 1979,

³¹ Wasserstein and Dumper, 2019.

³² Bein in and Hajjar, 2014; Bianet, 2017.

³³ Bein in and Hajjar, 2014.

³⁴ Bianet, 2017.

³⁵ Bein in and Hajjar, 2014.

³⁶ Ibid.

³⁷ Wasserstein and Dumper, 2019.

³⁸ Al-Rimmawi, 2003, 76-85; Bein in and Hajjar, 2014.

³⁹ Bein in and Hajjar, 2014.

⁴⁰ Bianet, 2017.

⁴¹ Ibid.

and Egypt became the first Arab state to recognize Israel. With this agreement, Israel returned the Sinai Peninsula it occupied in 1967 to Egypt⁴².

In December 1987, the Palestinians launched a mass riot against the occupation. It was called Intifada (meaning "shaking" in Arabic) and aroused great global interest with the figure of civil Palestinians who resisted Israeli soldiers armed with heavy weapons just by throwing stones⁴³.

In 1988, The PLO adopted the "two states" solution in the United Nations decision of 1947. After Oslo (Norway) Israel-PLO negotiations, Declaration of Principles, based on mutual recognition of Israel and PLO, was signed in Washington in September 1993. The Declaration stated that Israel would withdraw from the Gaza Strip and Jericho and some unspecified areas of the West Bank over a five-year interim period⁴⁴.

In Cairo on May 4, 1994, Israel and the PLO agreed on how to implement the Declaration of Principles. Israel agreed to leave the Gaza Strip, except the Jewish settlements and surroundings⁴⁵. This agreement is followed by the agreement, called "Oslo II Accord" which was signed in two separate ceremonies in Taba, Egypt and Washington, USA, on September 24, 1995. This agreement divided the West Bank into three; Region A constituting 7% of the West Bank excluding Al Quds and Al-Khalil, where Palestinian Authority would govern; Region B constituting 21% of the West Bank, where would be under the control of both Israel and Palestinians, and Region C representing the 62% of the West Bank, where Israel would control. Israel would also release Palestinian prisoners⁴⁶. Palestinian National Authority (PNA) formed after Oslo talks, officially has control over 18.2% of territory including 16 governorates of (in alphabetical order) Bethlehem, Deir al-Balah, Gaza Strip, Hebron, Jenin, Jericho, Al Quds, Khan Younis, Nablus, North Gaza, Qalqiliya, Ramallah/Al-Bireh, Rafah, Salfit, Tubas and Tulkarm⁴⁷. Although Israel still controls land, airspace, and sea lines of Palestine, Oslo Agreements constitute the basis of relations between the two states⁴⁸.

Following the Israeli government's decisions such as building more settlements in the occupied territory and digging a tunnel under the El Aqsa Mosque⁴⁹, the second Intifada occurred between September 2000 and 2005/06⁵⁰. Since 2001, Israel has prevented Palestinian public institutions to settle and to carry out any activities in Al Quds⁵¹. Beyond that, since the summer

⁴² Ibid.

⁴³ Ibid.

⁴⁴ Bein and Hajjar, 2014.

⁴⁵ Bianet 2017.

⁴⁶ Friedrich Naumann Foundation for Freedom, 2013; Bianet, 2017; Ghodieh, Abahre, and Huang, 2019, 10-18.

⁴⁷ Fanack, 2020a

⁴⁸ Ibid.

⁴⁹ Bein and Hajjar, 2014; Bianet, 2017.

⁵⁰ MoNE, 2014; Ghodieh, Abahre, and Huang, 2019, 10-18.

⁵¹ Bein and Hajjar, 2014.

of 2002, a wall has been built to separate Israel from the West Bank and to prevent uncontrolled entries of Palestinians to Israel⁵².

Following the Palestinian Authority's application as the "Member State" status to the United Nations, Palestine was granted a non-member "Observer State" status on 30 November 2012⁵³. Therefore, UN equates Palestine with the Holy See of Vatican City and indirectly recognizes Palestine's sovereignty. It should be noted that, instead of the term 'National Authority', the UN adopted the title of 'State'. Moreover, since 2013, the Palestinian President has been attending sessions among 'Heads of States'. These are important actions that show the tendency in the UN to find a permanent solution to Palestinian independence and sovereignty instead of its long-standing status without full authority⁵⁴.

Subsequently, Palestine became a member of the United Nations Educational, Scientific and Cultural Organization (UNESCO) in 2011 and of the International Criminal Court (ICC) in 2015 which were important steps for Palestinians to join the international community. Following Palestine's official membership in 2015, the World Tourism Organization (UNWTO), in the same year, organized the International Conference of Religious Tourism, in Bethlehem⁵⁵.

Based on the Declaration of Principles of Interim Self-Government (DoP), the Palestinian State created the legislative (PLC), executive (government) and judicial bodies. PLC adopted the Basic Law to act as a temporary constitution, leading to ultimate statehood⁵⁶. The Palestinian State is ruled by a president elected for four years, and the President appoints Prime Minister among PLC members elected every four years. Between 1996 and his death (2004) Yasser Arafat became the first president of Palestinian State. Since his death, Mahmud Abbas has been the president. On the other hand, after the 2006 elections, the Palestine has, de facto, two governments; Fatah in the West Bank, and Hamas in the Gaza Strip⁵⁷. After the establishment of the PNA, Palestinian territories entered a relatively stable period and people started to travel freely and tourism began to develop domestically⁵⁸. Moreover, establishment of the Ministry of Tourism and Antiquities (MoTA) in 1993 was one of the most important steps to build tourism development strategies and have some control over tourism activities⁵⁹.

Today, about 3 million Palestinians live within Israel, the West Bank and Gaza⁶⁰. In addition to 1.2 and 1 million Palestinians living in West Bank and Gaza respectively, 700,000 Palestinians

⁵² Isaac, 2009, 247-254; Çakmak and Isaac, 2012, 124 – 133.

⁵³ Bianet, 2017.

⁵⁴ Al-Rimmawi and Butcher, 2015, 317 – 335.

⁵⁵ Ibid, 317 – 335.

⁵⁶ Beinin and Hajjar, 2014.

⁵⁷ Fanack, 2020a

⁵⁸ Al-Rimmawi, 2003, 76-85.

⁵⁹ MoNE, 2014.

⁶⁰ Ghodieh, Abahre, and Huang, 2019, 10-18.

reside within the borders of the 1949 ceasefire and are Israel citizens. Another 3 million Palestinian refugees forced to migrate with direct deportations and military actions, live abroad⁶¹.

4.1.2. Economy

When economic sectors are analyzed, it is particularly observed that political factors are effective. It is unlikely that economy would recover if Israel's restrictions over West Bank and the Gaza Strip continue⁶². Reducing/removing Israel's punitive and non-transparent restrictions on mobility, access and trade would allow Palestinians to import inputs for production and expand the market for their goods and services⁶³. The World Bank⁶⁴ also estimates that ending economic isolation and alleviating the blockade would help rebuild Palestinian infrastructure and economy and lead to an additional 32% economic growth by 2025.

West Bank and Gaza are dependent on foreign markets. Overall, the rise in the West Bank and Gaza's imports from Israel, from USD 0.8 billion in 1988 to USD 2.6 billion in 2007, reveals the dependence of the Palestinian economy on Israel. Moreover, key sectors of the Palestinian economy such as electricity, oil and its derivatives and natural gas are provided by Israeli companies⁶⁵. On the other hand, Israel's weight in the tourism sector is also evident. While less than one-fifth of the tourists visiting the city stay in Palestinian hotels, the revenue which hotels and food and beverage (F&B) enterprises in Al Quds generate, accounts for only 8% of the city's total tourism income⁶⁶.

Israel's barriers threat all sectors, and the lack of stability has affected all economy. Palestinian industries cannot compete in regional and international markets, and also tourism should be up and running for all sectors to be flourished⁶⁷. The figure below highlights the weight of imported products in the economy and indicates that the production in the country is not at the desired level in terms of both raw material and final product. In other words, it reveals that the Palestinian economy is based on imports.

Due to detrimental effects of wars and military interventions, the construction sector is one of the key economic activities in Palestine and has a direct impact on GDP and employment as well as many other economic activities⁶⁸. Although 63% of the arable land is out of use since they are in Area C, which is under the control of Israel, agriculture is still an important source of business

⁶¹ Beinin and Hajjar, 2014.

⁶² Fanack, 2020b

⁶³ World Bank, 2018

⁶⁴ Ibid.

⁶⁵ Isaac, 2010, 16-26.

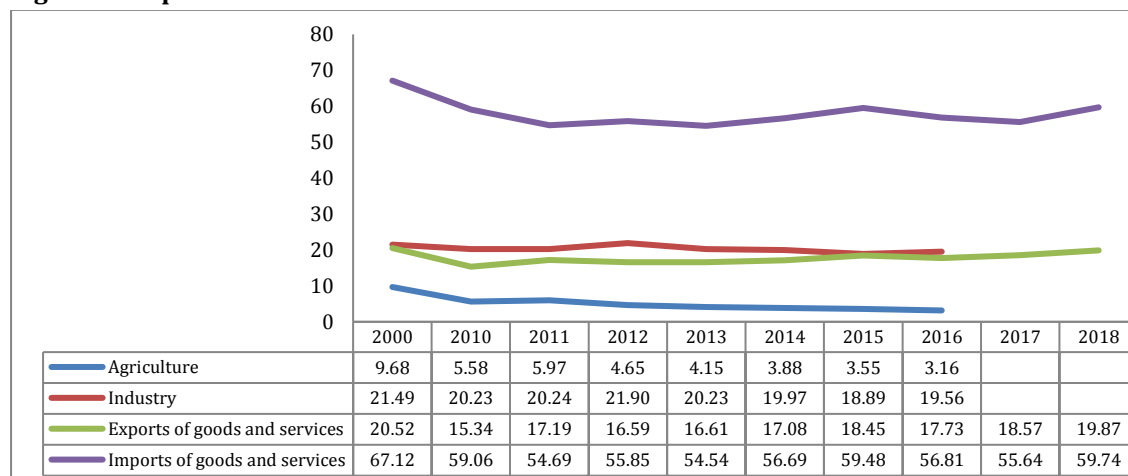
⁶⁶ Jafari, and Abdullah, 2019.

⁶⁷ Fanack, 2020b.

⁶⁸ Ibid.

and income. Ignoring unofficial employment especially women, the sector has a share of 15.2% of labor force⁶⁹.

Figure 3 Proportion of Sectors in total GDP of the West Bank and Gaza



Source: By authors own, based on the data by World Bank (2020a)

* The figures of agriculture include the forestry and fishing also.

** The figures of industry include the construction sector also.

Rather than technology, industrial sector is labor-intensive and contributes to 13.1% of the GDP. The industry mostly relies on the production of traditional handicrafts such as textiles, shoes, ceramics, leather, seashells, colored glass, soap, embroidery and products of olive wood and bamboo. On the other hand, the food processing industry, which is mostly based on milk and meat products, beverages, pasta, cereals, canned foods, dessert production, fats and animal feed production, is the most important manufacturing industry. The sector which has a magnitude of around USD 400 million, and accounts for about 24% of the industrial sector, employs about 16.8% of the total Palestinian workforce⁷⁰.

In the first half of 2018, the growth rate of the real gross domestic product (GDP) of the Palestinian economy (West Bank and Gaza Strip) reached 2%. This figure masks the 6% contraction in economic activity in Gaza. In contrast, the economic growth rate in the West Bank was 5%, mainly due to public consumption in the same period. The World Bank predicts that the GDP of Palestine would grow between 0.5% and 1.6% in 2019-2021⁷¹.

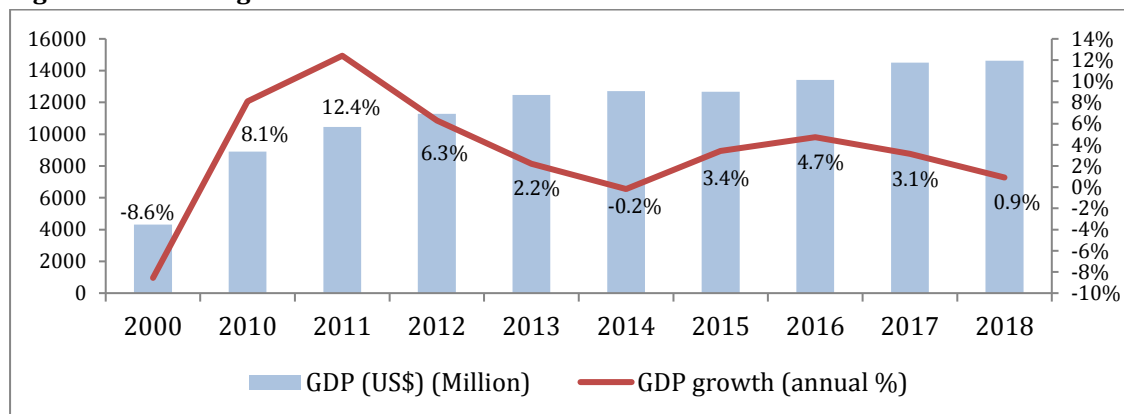
GDP figures in Figure 4 indicate that economic life is heavily influenced by the socio-political tensions and Israeli occupation and restrictions. In 2000, when II. Intifada started, GDP decreased by 8.6%, but afterwards it bounced back slowly and followed an upward trend. In recent years, it has increased by an average of 3%.

⁶⁹ Ibid.

⁷⁰ Ibid.

⁷¹ Ibid.

Figure 4 GDP Changes in West Bank and Gaza



Source: By authors own, based on the data by World Bank (2020a)

Unemployment is a big threat for both economic and social stability in all economies. Israeli occupation and constraints led to high unemployment rates and consequently to poverty in Palestinian territory⁷². As of 2014, the workforce in Palestine is accounted as 618,000. 53.6% of the employment is in West Bank, while the other 30.4%, 12.6% and 3.4% of the work power were employed in Gaza Strip, Israel and Jewish occupied areas respectively⁷³. According to the World Bank⁷⁴, the poverty rate in Palestine increased from 25.8% to 29.2% between 2011 and 2016. Moreover, the figures for West Bank and Gaza differ. While poverty in Gaza increased from 38.8% to 53%, there was a small recovery in the West Bank and the proportion of the population living below the poverty line fell from 17.8% to 13.9%⁷⁵.

Total unemployment in the West Bank and Gaza Strip slightly dropped between 2014 and 2017, from 27% to 19% in approximate figures. The numbers diverge sharply between the West Bank and Gaza Strip, with 18% in West Bank and 44% in Gaza⁷⁶. Considering the female employment, the rate is less. For example, Arafeh⁷⁷ states that only 1/5 of women in Palestine participate in economic life. The accommodation industry employs mostly male while the women employees are dominant in the handicraft industry⁷⁸.

⁷² Al-Rimmawi and Butcher, 2015, 317 – 335.

⁷³ Fanack, 2020b.

⁷⁴ World Bank, 2020a.

⁷⁵ Fanack, 2020b.

⁷⁶ Ibid.

⁷⁷ Arafeh, 2018, 24-32.

⁷⁸ MoNE, 2014.

4.2. Al Quds

The ancient city of Al Quds which has a history of about 4500 years and was designated as UNESCO World Heritage Site in 1981 is an ideal religious tourism destination for followers of Islam, Christianity, and Judaism. Al Quds is very important for Muslims, because of Kubbet-us-Sahra (the Noble Sanctuary), Haram Ash-Sharif and Al-Aqsa Mosque which is the first Qibla for Muslims. One of the holiest churches for Christianity, the Holy Sepulcher and the holiest Jewish place, Western Wall (Al Buraq for Muslims the Wailing Wall), are also in the old city of Al Quds. Omar Mosque, Tomb of the Virgin Mary, Church of St. Anne, Pools of Bethesda, Via Dolorosa and many synagogues can be mentioned as other religious attractions.

The meaning of Al Quds in English is "The Holy" or "Holy Sanctuary"⁷⁹. Israel calls the city as "Jerusalem", meaning "the foundation of the God Shalem". Salam or Shalom in modern Arabic and Hebrew stems from Shalem which means "peace" in Hebrew. Valleys surround Al Quds and the city stands at an altitude of 785 meters. In the east, the city faces the Dead Sea, the Jordan River and the mountains in the eastern Jordan. In the west, Mediterranean shores lie down about 60 km away⁸⁰.

Religion has always been an important classification among the citizens of Al Quds. The neighborhoods were always segregated based on religious ties. Today, the term "Palestinian" is used to describe Arabs (Muslim, Christian, and Druze)⁸¹. Muslims are the most homogeneous group, almost all Arabs. The Christian community which is around 15.000 is somewhat more diverse, though 4/5 are again Arabs. On the other hand, Jewish society is ethnically very heterogeneous including diaspora Jews from all over the world and the indigenous Jewish community⁸².

The population of the unified city more than doubled since 1967. After 1967, Jews began to settle in the eastern part of the city where the Palestinians resided throughout history. Similar to other occupied Palestinian territories, Muslim and Christian population in Al Quds started to decline after 1947 due to Israeli policies. However, after 1960s, the Muslim population increased, while the proportion of the Christian population remained almost constant. On the other hand, the Jewish population continued to grow but its proportion has been decreasing recently. The weight of the Jewish community, which was previously 3/4, is 2/3 today. Although some Jews residing in Al Quds migrate to other parts of Israel, this is largely due to the high rate of natural increase in the Palestinian population⁸³.

⁷⁹ Degarmo, 2011.

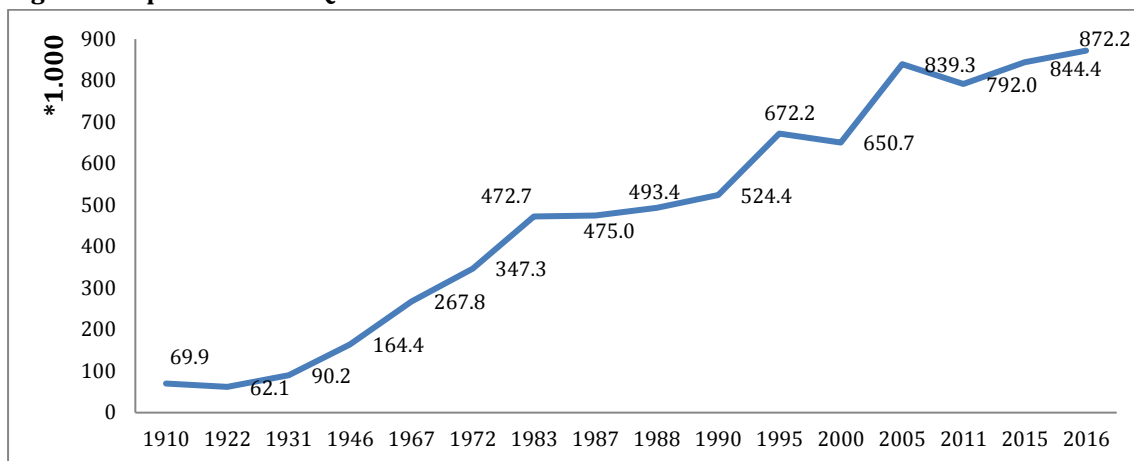
⁸⁰ Wasserstein and Dumper, 2019.

⁸¹ Beinin and Hajjar, 2014.

⁸² Wasserstein and Dumper, 2019.

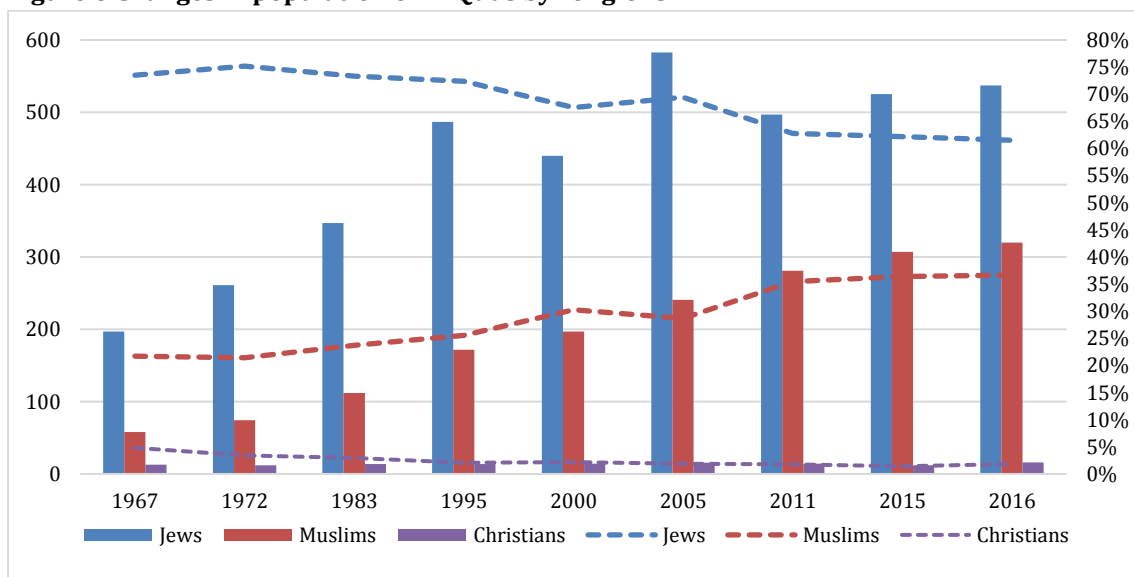
⁸³ Wasserstein and Dumper, 2019; Jafari and Abdullah, 2019.

Figure 5 Population of Al Quds



Source: By authors own, based on the data by ProCon, 2020; Kark and Oren-Nordheim, 2001

Figure 6 Changes in population of Al Quds by religions



Left axis: Population in numbers (thousands); Right axis: Population as percentage

Source: By authors own, based on the data by ProCon (2020)

Al Quds is run by the City Council and the Mayor. Although the municipality serves in both Hebrew and Arabic languages, there has been no Palestinian in the city council since 1967. Therefore, the municipality policies and implementations reflect only concerns of the Jewish society. 13% of Al Quds is allocated for the Palestinian society and 35% for Jewish settlements. The rest is determined as the land out of development.

Since 1967, there is a very big income gap between Palestinians and Israelis, at a ratio of approximately 1 to 9; however, Palestinians pay the same taxes. In the interviews held during the study, it was often emphasized that most of the Palestinian businesses do not have the capacity to follow the tax legislation easily and have to use external consulting services to

understand, protect or demand their rights. Moreover, although approximately 40% of Al Quds population is Palestinian and they contribute to tax revenues more than 40%, in return, only 1/10 of taxes are allocated for Palestinians and they never had high quality services compared to Jewish society⁸⁴. Compared to services in the Jewish settlements, municipal services such as roads, pavements or sanitation in the Palestinian neighborhoods are significantly insufficient⁸⁵. Almost, there are no signage, labels indicating Palestinian towns or cities, even historically or religiously significant ones. When the signages are installed, the Jewry destroys them⁸⁶.

4.2.1. Economy

The economic situation in the old city market is being deteriorated due to Israeli policies. Between 1948 and 1967, the tourism sector became the main driving force for Al Quds economy with the flow of Muslim and Christian visitors to the city and with intensified economic growth and investment. However, after Israel's invasion in 1967, Al Quds was severed from other Palestinian territories and Israelization efforts intensified. Besides, the city was forced to adapt to the Israeli economy, and its economy became increasingly dependent on Israel⁸⁷.

The most important effects are the high taxes and low service level provided in return. Israeli administration forces Palestinians to sell their stores to pay their tax debt. Besides, the Separation Wall affects all sectors of Al Quds upon the weakness of the market⁸⁸. New trade centers have been created that attract Palestinians, and the proportion of Palestinians residing on the other side of the wall and shopping from the old city has dropped from 18% to 4%⁸⁹.

Although science-based industries have evolved in the West side of Jerusalem since 1980s, government and civil service employment are the main sources of income in Al Quds. De-industrialization, reduced production capacity, poor business and trade sector, stagnant investment environment, limited tourism sector, denuded education sector, lack of housing, lack of finance and human resources and consequently dis-competitiveness with Israeli businesses characterize socio-economic conditions in Al Quds⁹⁰.

Rather than the improvement in the economy⁹¹, the increase in labor force need of Israeli companies leads a slight decrease in unemployment. Palestinians work on the Israeli side as unskilled workers, especially in the tourism and construction sectors⁹². Moreover, between the years 2015-2017, approximately 40% of Al Quds residents were employed by Israeli companies

⁸⁴ State of Palestine, Palestine Liberation Organization Negotiations Affairs Department, n.d.

⁸⁵ Wasserstein and Dumper, 2019.

⁸⁶ Kassir, 2006.

⁸⁷ Arafeh, 2018, 24-32.

⁸⁸ Al-Rimmawi and Butcher, 2015, 317 – 335.

⁸⁹ JACCI, 2018.

⁹⁰ Arafeh, 2018, 24-32.

⁹¹ Jafari and Abdullah, 2019.

⁹² Wasserstein and Dumper, 2019.

and they generated 54% of the income of the Al Quds households⁹³. Based on Palestinian Central Bureau of Statistics (PCBS) data, Jafari and Abdullah⁹⁴ state that the workforce at Al Quds is distributed by the sectors as follows.

Table 1 Sectoral distribution of Al Quds Employment

Year	Agriculture	Industry	Construction	Trade, restaurants and hotels	Travel and transport	Other sectors
2011	2.6	12.3	22.3	23.6	11.8	27.4
2012	1.7	10.8	22.5	24.6	12.5	28.0
2013	1.1	10.9	24.8	22.7	13.4	27.0
2014	1.9	13.8	31.7	20.7	8.1	24.0
2015	0.8	12.4	32.0	24.6	6.7	24.0
2016	0.7	13.0	30.0	25.0	7.0	24.0
2017	0.1	13.4	25.3	27.5	8.0	24.4

Source: Jafari and Abdullah (2019)

Beyond the fact that 23% of the population lives under the poverty line in west part of Al Quds, however, in Al Quds, this proportion has increased over the years and today almost 4/5 of East Jerusalemites experience poverty⁹⁵.

4.3. Tourism

Palestine is considered as holy by all of three Abrahamic religions: Islam, Christianity and Judaism. Beyond this religious significance, it can be stated that all Palestinian lands are kneaded with historical, cultural, natural and socio-cultural attractions. For example, for Muslims, Al Quds is the spot where, according to traditional interpretations of the Koran and other texts, the prophet Muhammad ascended. Prophet Muhammad was carried from Mecca to Jerusalem, and then from Jerusalem into the heavens, where he conversed with prophets before returning to earth. On the other hand, Bethlehem hosts Church of Nativity which is the oldest Christian church still in daily use and which is built over the cave where Jesus Christ was born, and other sacred places like Manger Square, Church of St. Catherine, Milk Grotto, Shepherds' field and Solomon's Pools. Moreover, Jericho, the oldest city in the world has the Dead Sea, Ein es-Sultan, Mosaic centers, Tell es-Sultan, Mount of Temptation, St. George Monastery, Wadi Qelt and Deir Hajla as tourist attractions. In addition to these sites, tourists can visit tombs of great patriarchs and matriarchs like Abraham, Isaac, Jacob or Sarah, Rebecca, Leah in Hebron. Other examples include springs and Umm Al-Rihan forest in Jenin, or Nablus' olive oil, olive-oil soap and olive wood products. On the other side, Ramallah is renowned for festivals on dance and folklore as

⁹³ Jafari and Abdullah, 2019.

⁹⁴ Ibid.

⁹⁵ Hasson, 2012; Jafari and Abdullah, 2019.

well as the well-qualified tourist services (accommodation and restaurants) and nightlife. It should also be noted that the goods used by local people in their daily life stand out as an international identifier. For example, the black and white scarf (keffiyeh) has become a global symbol of Palestinian identity⁹⁶. Besides, Gaza, where tourism activities could not be realized due to the Israeli blockade, is famous for its fishing markets and beaches.

It is also possible to designate alternative tourism routes/track and products in the region. For example, Sebastia, a small Palestinian village near Nablus, is the area of many stories in Holy Quran and the Bible, especially the ones about St. John the Baptist (or in Arabic, Prophet Yehiya)⁹⁷. It is also believed that Adam and Eve lived in Hebron after expulsion from heaven; therefore, routes/products related to the beginning of life can be designed. However, other than pilgrimage tourism, these resources and potentials could not be utilized sufficiently and restrictions and political situation limits investments and hence the development of these attractions⁹⁸.

The Palestinian tourism industry is experiencing major setbacks, especially during periods of political and security unrest, such as Intifadas or Israeli invasion⁹⁹. For example, tourism in Gaza was active before 1967 with hotels and beaches, but there is no tourism today because of Israeli blockade. On the other hand, as the result of the 1967 war, the tourism in the West Bank also, collapsed but it recovered when the political or social situation is stabilized. This can be observed in the steady improvement of the sector in the period between the Oslo Accords and the 2nd Intifada (between 1993 and 2000)¹⁰⁰.

The principal obstacle in front of the Palestinian tourism is the Israeli occupation and its consequences¹⁰¹. After Israel annexed of Al Quds illegally, MoTA lost its authority in the city, and the Palestinian enterprises cannot get any institutional and strategic support to coordinate their activities in a comprehensive manner¹⁰². Israel also controls the access to Al Quds, the West Bank and Gaza, therefore the tourist flows are governed by Israeli government and companies. Israel also restricts the realization of any coordinated action organized by tourism businesses and organizations¹⁰³, beyond limiting the movement of Palestinians in the West Bank¹⁰⁴. For example, Israeli guides, drivers and tourist groups are not allowed to stay on Palestinian territory (Zone A) for more than an hour (45 minutes to visit attractions and 15 minutes for shopping)¹⁰⁵ and, Israeli tour operators often bypass Palestinian destinations

⁹⁶ Fanack, 2020d.

⁹⁷ State of Palestine, Palestine Liberation Organization Negotiations Affairs Department, n.d.

⁹⁸ MoNE, 2014.

⁹⁹ MoNE, 2014; Isaac and Eid, 2019, 1499–1522.

¹⁰⁰ Al-Rimmawi and Butcher, 2015, 317 – 335.

¹⁰¹ Suleiman and Mohamed, 2011, 41-52.

¹⁰² COMCEC, 2019.

¹⁰³ Ibid.

¹⁰⁴ Al-Rimmawi and Butcher, 2015, 317 – 335.

¹⁰⁵ Al-Rimmawi, 2003, 76-85.

whenever it is possible¹⁰⁶. Consequently, most of the income from tourism is earned by Israelis. Studies indicate that since basic services such as transportation, accommodation, food and beverage are under the control of Israeli businesses, 85-90% of the added value flows into Israel¹⁰⁷.

Figure 7 Tourist attractions of Palestine



Source: Fanack (2020d)

Tourism has been used as an important tool in colonizing Palestine and in demonstrating the success of the Zionist movement and Jewish immigrants¹⁰⁸. Another important factor that the Israeli government uses to weaken Palestinian society is that most of the guides in Al Quds are

¹⁰⁶ MoNE, 2014.

¹⁰⁷ Al-Rimmawi, 2003, 76-85; Purkiss, 2014.

¹⁰⁸ Jerusalem 5800, 2016; Boer, 2016, 9-21.

Israeli and reflect historical information from Israeli perspective¹⁰⁹. Al Quds and the West Bank are "marketed" under Israeli brand to hide the fact that tourists are in Palestine (in occupied territories). Furthermore, names such as "Judea" and "Samaria" or Temple Mount (real name Haram al-Sherif) are widely used¹¹⁰. Since 2009, the West Bank or other Palestinian territories have not been mentioned in the promotional materials of the Israel Ministry of Tourism. Israeli tourist maps do not display any Palestinian territories and even the West Bank and Gaza. Most tourists do not even realize that they are out of Israel when they visit Palestinian territory¹¹¹. Moreover, the tourists buy traditional Palestinian products such as knitting's, carvings from olive wood or Hebron glass, but as Israeli souvenirs¹¹².

Destination images are a combination of thoughts, attitudes, and opinions. Regardless of whether they are congruent with reality, destination images affect individuals' intentions and behavior¹¹³. In this respect, the fact that the Palestinian State is a sub-market of the Israeli market has some advantages¹¹⁴ and some Palestinian tour operators prefer to market the area as "Holy Land" rather than "Palestine". Many people do not associate Palestinian State and Israel with the Middle East in many cases. Visitors often define Israel in connection with Europe, and the Palestinian State (or at least the classical Holy Land) is heavily involved in this perception¹¹⁵. This situation enables the region to be considered less "dangerous" or "political"¹¹⁶.

On the other hand, concerns about politics and security affect the visitor's demand and destination preferences. Palestine is usually perceived as a dangerous place to visit¹¹⁷. Moreover, public organizations do not suggest Palestine as a safe place to visit¹¹⁸. Therefore, the improvement of the political environment in Palestine would ensure that tourism reaches a higher level of development¹¹⁹. Most international tourist visits are organized by Israeli tour agencies and guides. Israeli tour guides portray Palestinians as primitive and worse, dangerous terrorists or unreliable¹²⁰. It leads to the perception that it is not safe to contact with Palestinians in the Old City and encourages them to shop in Western Al Quds¹²¹.

¹⁰⁹ COMCEC, 2019.

¹¹⁰ State of Palestine, Palestine Liberation Organization Negotiations Affairs Department, n.d; Peteet, 2005, 153-172.

¹¹¹ Kassis, 2006.

¹¹² Boer, 2016, 9-21.

¹¹³ Çakmak and Isaac, 2012, 124 - 133.

¹¹⁴ MoNE, 2014.

¹¹⁵ Ibid.

¹¹⁶ Boer, 2016, 9-21.

¹¹⁷ MoNE, 2014; Al-Rimmawi and Butcher, 2015, 317 - 335.

¹¹⁸ Muaddi, n.d.

¹¹⁹ COMCEC, 2019.

¹²⁰ Boer, 2016, 9-21.

¹²¹ COMCEC, 2019; Ghodieh, Abahre, and Huang, 2019, 10-18.

The number of Palestinian tour guides fell by 66% between 1967 and 1994, from 150 to 50. Currently, 50 tour guides are working actively¹²². This is the result of some obstacles and difficulties Palestinian guides face in obtaining a certificate to practice the profession and in entering West Jerusalem. Another problem that often forces tour agencies to work with Israeli guides rather than Palestinian guides is that many Palestinian tour guides are not multilingual to serve tourists from countries such as East and South Asia and Russia¹²³.

Beyond the fact that the Israeli car rental companies do not allow the leased vehicle to be transferred to the Palestinian side and asking the customer not to pass to the Palestinian side, Palestinian tour guides or transportation companies have not been able to enter Israel since 2000. Moreover, Palestinian guides who are licensed by the Israeli government can work in Israel, but generally do not prefer to mention politics or occupation since they are afraid of losing their jobs.

Tourism businesses and hotels in Al Quds have many other problems that businesses in the West Bank and Gaza Strip do not experience. Many Palestinian tourism companies such as tour operators, hoteliers, guides and bus operators and organizations such as The Arab Hotel Association (AHA), Holy Land Incoming Tour Operators Association (HLITOA), and Arab Tourist Guides Union (ATGU) are settled in Al Quds. Therefore, tourism statistics and revenues are recorded and taxed by Israel rather than Palestinian authorities¹²⁴. Palestinian hotel and souvenir shop owners in Palestinian neighborhoods have very strict restrictions to renovate their facilities or to build new ones, due to Israeli urban planning system¹²⁵. Also, hotels in Al Quds face hard and unfair competition. Businesses in Al Quds have to pay the "Arnona Tax", which varies depending on the location and size of the business. Such taxes reduce the profits of businesses in Al Quds to a great extent and force them to close¹²⁶. On the other hand, hotels in Al Quds experience many restrictions on mobility as well, unlike those in West Jerusalem. They are subject to restrictive labor law by Israel. While Israeli hotels offer modern products at similar room prices, Al Quds buildings are old but Israel does not allow any restoration activities. However, these restrictions do not exist in West Jerusalem. Israel imposes various restrictions for Palestinians who come to work from the West Bank to Al Quds¹²⁷.

Despite conflicts and political/social unrest, all Palestinian territories, and especially Al Quds, host a large number of visitors each year. Tourism in Al Quds and Palestine mainly concentrates on historical and biblical areas, and the majority of tourists come for religious purposes and they

¹²² Visitplaeatine.ps, n.d.

¹²³ Jafari and Abdullah, 2019.

¹²⁴ SESRIC, n.d.

¹²⁵ COMCEC, 2019.

¹²⁶ Ibid.

¹²⁷ Suleiman and Mohamed, 2011, 41-52.

are mostly Christian pilgrims¹²⁸. Other types of tourism, though at a lesser scale, include cultural tourism, health tourism (Dead Sea) or political/solidarity tourism¹²⁹.

In 2012, tourism, in Mediterranean countries, employed approximately 8 million people and directly generated an income of 377,5 billion dollars, which corresponds to 4.8% of the region's total employment and 4.5% of the GDP¹³⁰. Moreover, the Middle East countries are expected to experience an average annual growth rate of 4.6% between 2010 and 2030. The contribution of tourism to the GDP of the Middle Eastern countries is expected to increase by 4.2% annually between 2018 and 2027 and the number of international tourists to reach 149 million by 2030¹³¹.

When compared to Mediterranean countries, tourism has a lower contribution to Palestine's GDP and employment. Its direct contribution to Palestinian GDP is 4%, while the figures in Israel, Egypt, Jordan and Lebanon are 6%, 13%, 20% and 37% respectively. Compared to Jordan's or Israel's tourism promotion budgets of USD 10 million and USD 40 million respectively, Palestine has a very limited promotional budget of only USD 0.5 million¹³². It is also worth emphasizing that about half of Palestinian tourism revenues come from Palestinians who mostly live in Israel and visit Palestine¹³³.

On the other hand, tourism accounts for 5% of employment in the Middle East¹³⁴, but only 2% of total Palestinian employment. Other countries in the region have higher rates (4% in Lebanon, 8% in Israel, 11% in Egypt and 19% in Jordan)¹³⁵. Besides, other sectors are on the average 25% more efficient than the tourism sector in terms of labor productivity¹³⁶.

In Palestine, an estimated 15.000 people are employed in the tourism industry, and considering each job in tourism creates 1.5 jobs in other sectors, about 22,500 jobs are created by tourism, indirectly¹³⁷. MoTA¹³⁸ states that 12,000 tourism enterprises employed approximately 8.3% of the Palestinian workforce in 2017. Additionally, approximately 60% of Palestinian tourism facilities are F&B facilities, 28% are handicraft and souvenir businesses, and they absorb 53–65% and 22.9% of the tourism workforce, respectively. Although lodging businesses account for only 1.7% of total businesses in the industry, 9 to 13% of the workers are employed by them.

¹²⁸ COMCEC, 2019.

¹²⁹ Cohen-Hattab and Katz, 2001, 166–177; Fanack, 2020d.

¹³⁰ MoNE, 2014.

¹³¹ UN, 2014; WTTC, 2018.

¹³² Quartet, n.d.

¹³³ COMCEC, 2019.

¹³⁴ Al-Rimmawi, 2003, 76-85.

¹³⁵ MoNE, 2014.

¹³⁶ Al-Fallah, 2012; MoNE, 2014.

¹³⁷ UN, 2014.

¹³⁸ MoTA, 2018.

This emphasizes the high employment generation capacity of the accommodation sector¹³⁹. Among the tourism labor market, employment contribution of recreation activities and travel agencies are 13.4%, and 3.3% respectively, and the rest is employed in other tourism facilities.

The legal infrastructure for the tourism sector in Palestine consists of the main Tourism Law and five regulations (about travel agencies, tourist guides, hotels and restaurants, tourist shops and parks). The legislation is outdated; the legislation published under Jordanian rule is still in force. There are almost no provisions regarding occupational and ethical standards of the professions, except for tour guides. Therefore, there is a need for a new regulation that will introduce certification criteria and standard rules for different areas of the industry, such as accommodation, transportation, entertainment, food and beverage industry or events/organizations¹⁴⁰. From the policy perspective, it should also be noted that there is no clear national tourism strategy. Public support for the tourism sector is also very limited due to the current situation and tourism is not a priority among current public policies¹⁴¹.

Based on the Law on the Encouragement of Investment in Palestine (Law No. 1) enacted in 1998, and its amendments, some incentives are introduced. For example, no tax is levied until the enterprise makes profit in the first four years, or only 5% income tax is charged in the first 5 years. In addition to domestic businesspersons, international investors can also benefit from the same advantages, or they may transfer their investments at any time in any currency. Nevertheless, businesses in Al Quds cannot benefit from these incentives¹⁴². Considering that the Palestinian government is not operative in Al Quds, and the reluctance of Israel to improve the Palestinian tourism enterprises, it is essential to establish a superstructure to ensure cooperation and coordination among Palestinian businesses.

4.3.1. National Figures

Although the data show some fluctuations, it can be easily argued that the number of businesses which are main actors in, or giving support to the tourism sector earning a significant part of their income from the tourism sector have increased over the years. In addition to the accommodation facilities, the food and beverage establishments have been continuously increasing both in their number and in capacities. The number of restaurants, which was 84 in 2002, increased to 123 in 2012 and to 160 in 2017. In 2018, with a slight decline, there were 157 restaurants. Furthermore, there is a quantitative increase (although no data on quality is available) in the conference halls, which are especially important for the development of business and congress tourism. Their number was around 100 at the beginning of the 2000s and increased to over 150 in the 2010s. Between 2000 and 2018, the number and capacity of conference halls have increased gently but steadily. In 2018, this number was 201.

¹³⁹ Friedrich Naumann Foundation for Freedom, 2013; Middle East Business, n.d.

¹⁴⁰ MoNE, 2014.

¹⁴¹ Ibid.

¹⁴² PIPA, 2016.

Likewise, the capacities of the halls increased from 11000 in the 2000s to over 25000 in 2018. In this context, it can be stated that there is a base for congress– business tourism, provided that the quality of conference halls is at the desired level. Moreover, important as activity centers, the number of swimming pools and playground/sport halls has not increased enough over the years, and it is necessary to take some steps to ensure diversified tourism activities.

The travel agencies, among the most basic actors for the tourism sector and especially for the tourism in Palestine and Al Quds, generally focus on incoming tours and they are dependent on foreign tour operators or travel agencies. Although there is not much fluctuation in the total number of travel agencies throughout the years, there are inconsistencies in details. While Ministry of National Economy (MoNE)¹⁴³ stated that there are 43 tour operators and 220 travel agencies, in 2015, the number of tour operators, and travel agency or Hajj and Umrah organizations was stated as 107 and 157, respectively¹⁴⁴.

Table 2 Service facilities in Palestine

	Restaurants		Conference Halls		Swimming Pools	Playground /Sport Hall
	Number	Capacity	Number	Capacity		
2002	84	12,003	100	11,735	10	17
2003	87	13,962	100	11,361	11	18
2004	94	13,903	109	14,890	13	16
2005	98	16,518	114	17,949	11	18
2006	106	20,036	174	17,479	14	37
2007	108	19,723	111	16,249	14	13
2012	123	17,819	143	22,256	24	19
2013	134	18,550	157	20,333	24	19
2014	152	21,613	171	24,133	24	21
2015	152	22,129	177	24,461	23	22
2016	155	21,994	191	23,996	23	25
2017	160	22,554	--*	29,142	21	23
2018	157	22,184	201	25,645	26	27

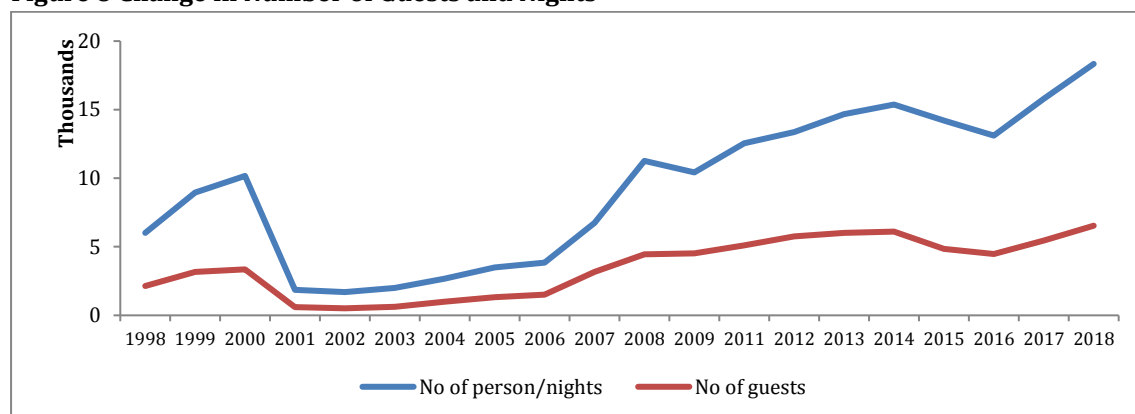
Source: By authors own, based on data by PCBS (various publications)

* The figure is not provided since it is found to be inconsistent with other data.

¹⁴³ MoNE, 2014.

¹⁴⁴ Middle East Business , n.d.

Figure 8 Change in Number of Guests and Nights

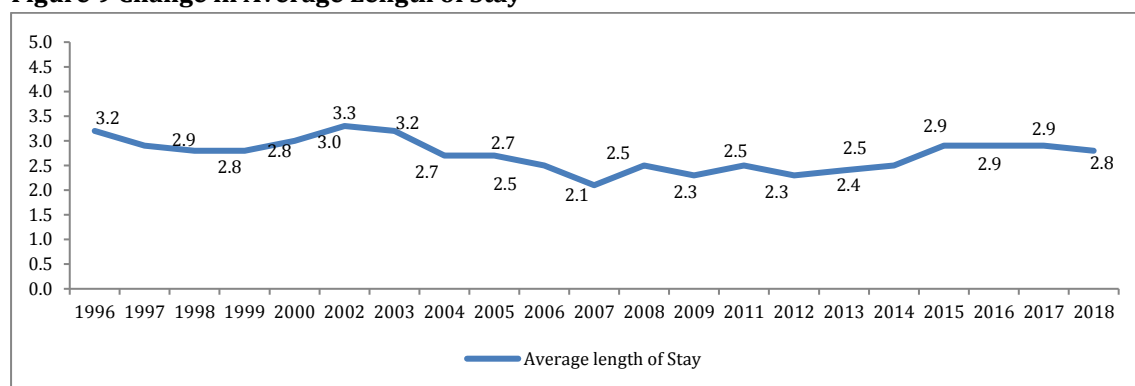


Source: By authors own, based on the data by PCBS

* 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.

Figure 9 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.

The number of tourists visiting the Palestinian lands increased during the times the political environment was more peaceful. Even Kassis¹⁴⁵ emphasizes that the number of visitors increased up to 105,000 per month during such periods. In the years just after the II. Intifada started, both the number of tourists and overnight stays decreased very sharply while there were 1 million overnights and 335,000 tourists in 2000; 60,208, 51,357 and 82,812 tourists spent 184,857, 169,641 and 199,275 nights in Palestine respectively in 2001, 2002 and 2003. 2002 was the worst season in terms of all data. Especially in the period after 2006, recovery was observed and the figures in 2000 were reached in 2008-2009. The upward trend continued in the following period. In 2016, tourists made over 1.3 million overnight stays¹⁴⁶, and the number of tourists and overnight stays reached to 0.65 million and 1.8 million, respectively, in 2018¹⁴⁷.

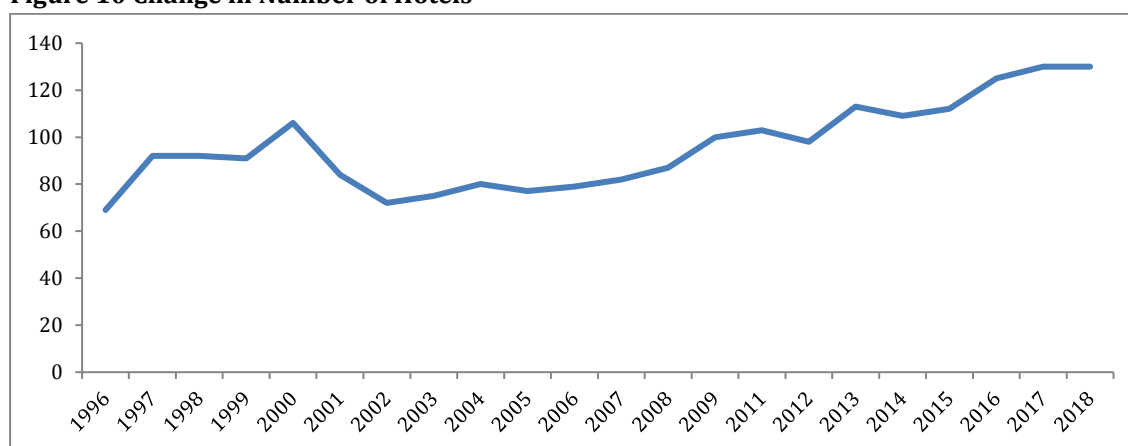
¹⁴⁵ Kassis, 2006.

¹⁴⁶ COMCEC, 2019.

¹⁴⁷ PCBS, 2020.

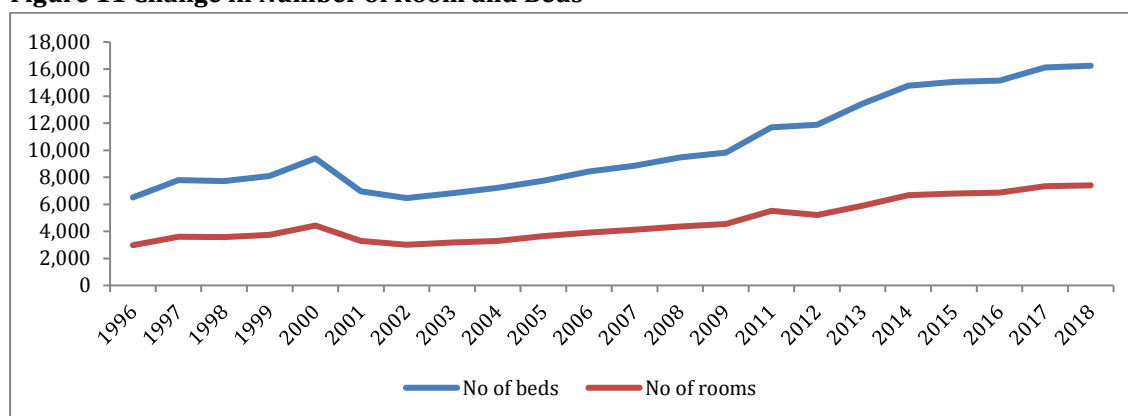
On Figure 9, it is seen that the average stay in Palestine has changed between 2.1 and 3.3 nights, corresponding to an average of 2.5 overnights overall. The figure 9 indicates that the average length of stay in Palestine is already at a level many tourism destinations want to reach. For example, the average length of stay is 2.6, 2.9, 3.0 and 3.4, in Milan, Barcelona, Osaka and Hong Kong, respectively, which are among important tourism destinations¹⁴⁸. However, considering that the average length of stay is more than 5 nights in West Jerusalem¹⁴⁹, or other some global destinations such as Seoul, Phuket, Palma de Mallorca, Istanbul, or Tokyo¹⁵⁰, it can be concluded that there is room for improvement for tourists to spend more time in Al Quds.

Figure 10 Change in Number of Hotels



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

Figure 11 Change in Number of Room and Beds



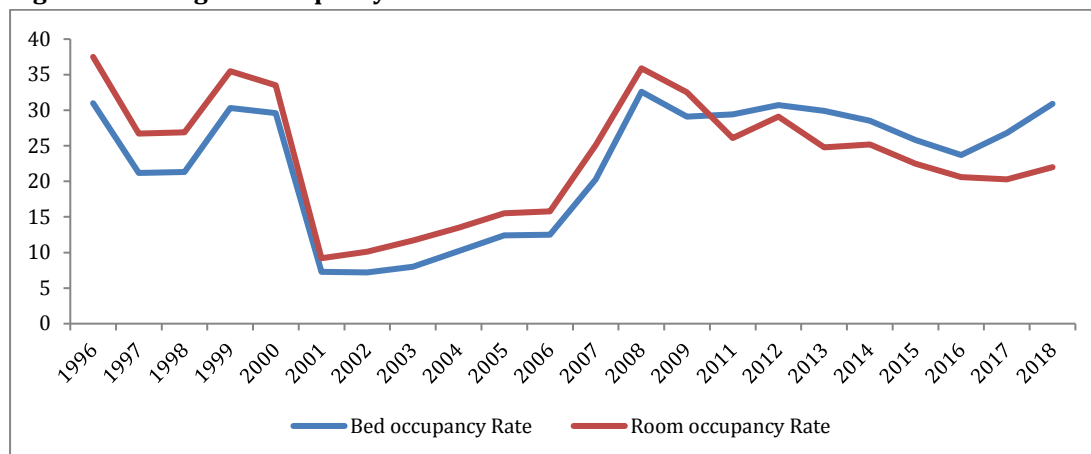
Source: By authors own, based on the data by PCBS

¹⁴⁸ Mastercard, 2019.

¹⁴⁹ Israel Ministry of Tourism, 2017; 2018; 2019.

¹⁵⁰ Mastercard, 2019.

Figure 12 Change in occupancy rates



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

Figure 10 indicates that the number of accommodation facilities also decreased after 2000. While there were 106 hotels in 2000, the number dropped to 72 due to the closure of many facilities between 2001 and 2003. Afterwards, the facilities started to reopen; however, until 2013, they could not reach the number of facilities in 2000. The bed capacity of the year 2000 was reached in 2009 and the room capacity was reached in 2011. In the last 5 years, the number of facilities continued to increase in limited figures and in 2018, a total of 130 hotels were operating.

By evaluating the Figures 10 and 11 together, it can be seen that the average number of rooms in the hotels is not very high and varies between 40 and 60. However, it has increased slightly over the years, indicating that larger capacity facilities have been opened. The average number of rooms, which was 38.8 in 1999, increased to 57 in 2018. This situation, on the one hand, indicates that the tourism sector is maintained by small businesses, and therefore tourism revenues can be spread to the wider strata of the society and on the other hand, emphasizes that businesses mostly are not institutionalized and are directly dependent on the management skills of owners. In other words, it indicates that it would be beneficial to increase the technical and managerial qualifications of tourism operators.

Despite the increase in the number of facilities, the fact that the occupancy rates are very low shows that the tourism activities squeezed to short seasons rather than spreading throughout the year. The number of tourists did not increase in parallel with the increase in the number of facilities and the occupancy rate in 2000 was not reached in the following years (except 2008) and in recent years it remained only between 20-25% (Figure 12).

Another interesting point is that the bed occupancy rate in 2011 and after is higher than the room occupancy rate (Figure 12). It verifies that tourists visiting Palestine travel in groups and (to minimize the pecuniary costs) rent as few rooms as possible. This indirectly underlines the

spending attitudes of religious tourists¹⁵¹. Therefore, diversifying the tourist profile and attracting tourists also other than religious pilgrims would contribute to increasing tourism incomes.

As it is seen on Figure 13, the biggest tourist source for Palestine is Europe, indicating the importance of Palestine for Christianity. In the European market, Russian Federation, Romania, Poland, Italy and Germany occupy the top rows¹⁵². Figure 13 clearly shows that the decrease in the number of tourists between 2001 and 2003 was mainly due to the decline in European tourists. Following Europe, it is seen tourists from Asian countries, Israeli citizens and Palestinians came to visit the city. The Asian market is gaining more importance in the world tourism market, therefore, it forms a great potential for marketing and effective promotional and PR activities may ensure that more visitors will come from this continent.

It should be noted that domestic tourism, formed by the Diaspora and Palestinians living within the borders of Israel¹⁵³, has special importance not only for economic contribution to the Palestinians, but also for strengthening the ties of people with their roots, and explaining the Palestinian rights on international platforms. Domestic tourism market is less affected by political disturbances and represents an important potential to minimize the seasonality. On the other hand, tourists from North America, especially USA citizens¹⁵⁴ and Africa have increased in recent years. These markets can also be utilized in ensuring tourist diversity and reducing dependency on Europe. Another critical point is the low number of tourists from Arabic countries. Therefore, improvement of the political environment may lead Palestine to be an attraction point for Arab countries and Muslim tourists.

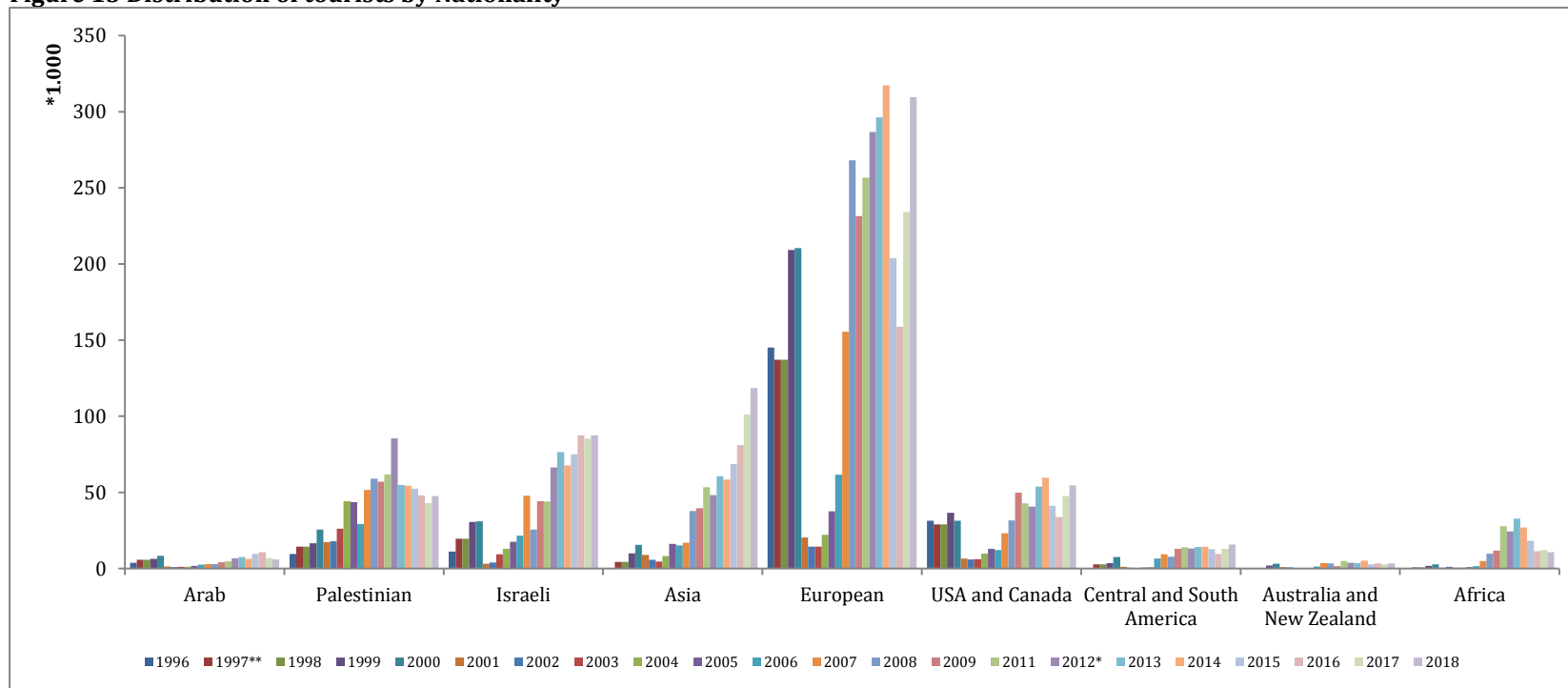
¹⁵¹ Jafari and Abdullah, 2019.

¹⁵² MoNE, 2014; Isaac and Eid, 2019, 1499–1522.

¹⁵³ MoNE, 2014

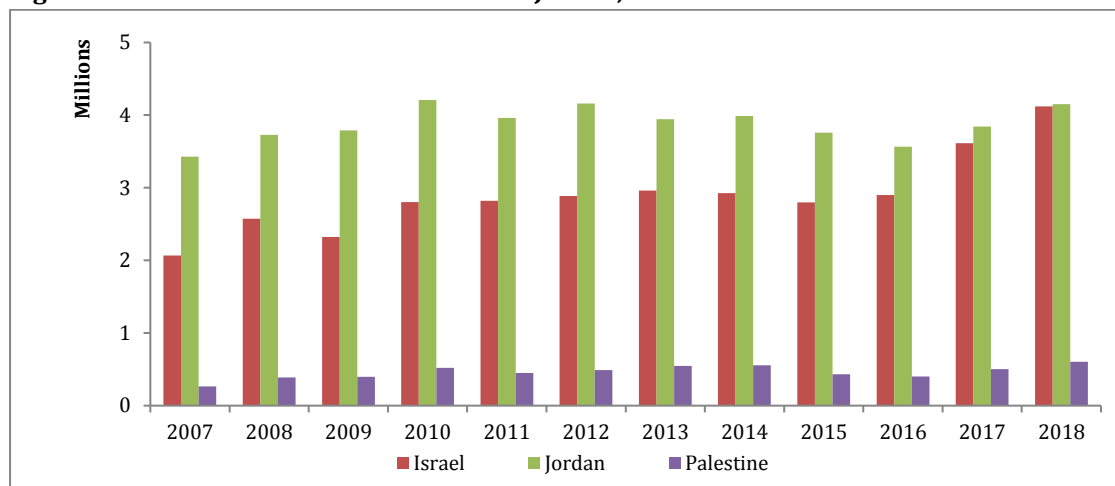
¹⁵⁴ MoNE, 2014; Isaac and Eid, 2019, 1499–1522.

Figure 13 Distribution of tourists by Nationality



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

Figure 14 International Tourist Arrivals in Jordan, Palestine and Israel



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

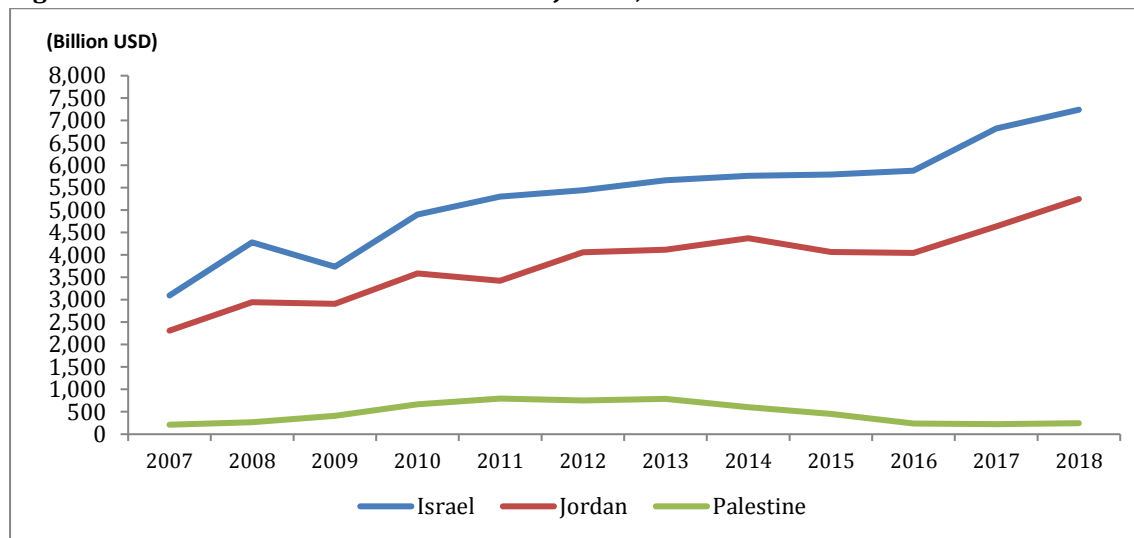
When considered regionally, although the number of international tourists has increased in recent years, Palestine, Israel and Jordan still host a very low number of tourists (Figure 14). In other words, they do not benefit much from increased tourism activities. The total number of tourists visiting these three countries is around 8.9 million. Palestine has the lowest figures among these three countries. Although, initially Jordan attracted the most tourists among these three countries, Israel, in recent years, has increased the number of tourists and closed the difference. While the number of international tourists visiting Israel and Jordan in 2018 was very close to each other (about 4.2 million), only 0.65 million international tourists visited Palestine. These figures are congruent with the statements of Ghodieh et al. (2019)¹⁵⁵ that tourists prefer to visit Israel and Jordan, rather than Palestine, and that Palestine is only a stop over for them. Therefore, it would be beneficial for Palestine to cooperate with neighboring countries (for current political reasons, especially and primarily with Jordan) in order to attract more tourists to the destination.

In parallel with the number of tourists, Israel and Jordan are also increasing their tourism revenues. However, Palestinian tourism revenues are declining. After approximately USD 0.8 billion of tourism income obtained in 2011, there was a steady decline in the following years and only USD 235, 225 and 245 million were generated in 2016, 2017 and 2018, respectively (Figure 15). Between 2011 and 2018, Palestinian tourism revenues decreased by approximately 70%. In Israel, tourism revenues which was USD 5.3 billion in 2011, increased by 36.5% and exceeded USD 7.2 billion in 2018. Likewise, Jordan achieved a 31.3% increase in tourism revenues, from USD 4 billion in 2011 to 5,25 billion in 2018. The expenditure per tourist has the same picture. Figure 16 indicates that in Palestine, the average expenditure per tourist, which was around USD 750 in 2007, increased to USD 1,770 (USD 1,880 in Israel) in 2011, but afterwards went into a sharp decline. In 2018, tourists spent USD 400 on the average, implying a 77% reduction

¹⁵⁵ Ghodieh, Abahre, and Huang, 2019, 10-18.

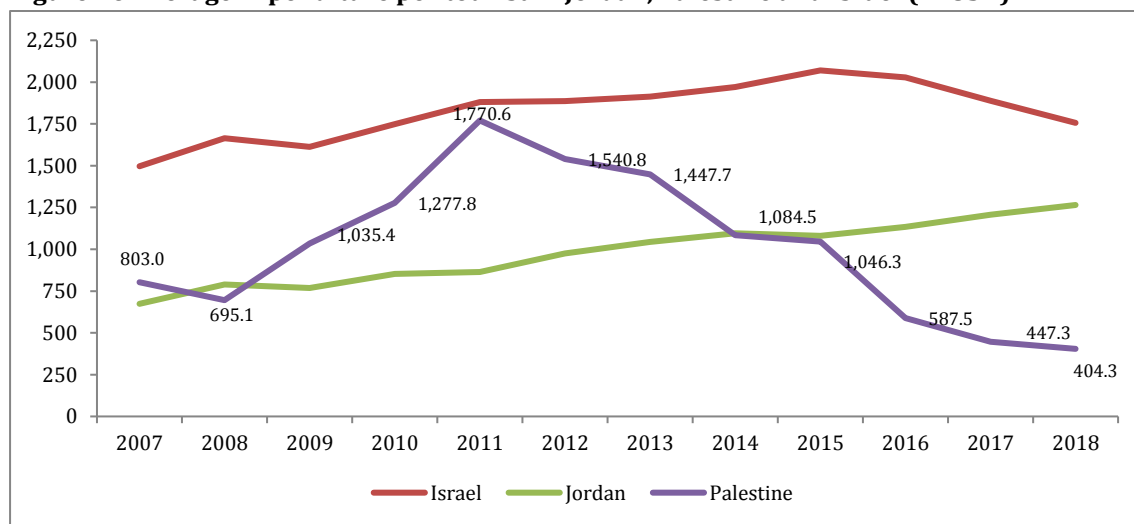
compared to 2011. Therefore, it seems crucial to increase the variety and quality of tourism products to increase average expenditure per tourist.

Figure 15 International Tourist Revenues of Jordan, Palestine and Israel



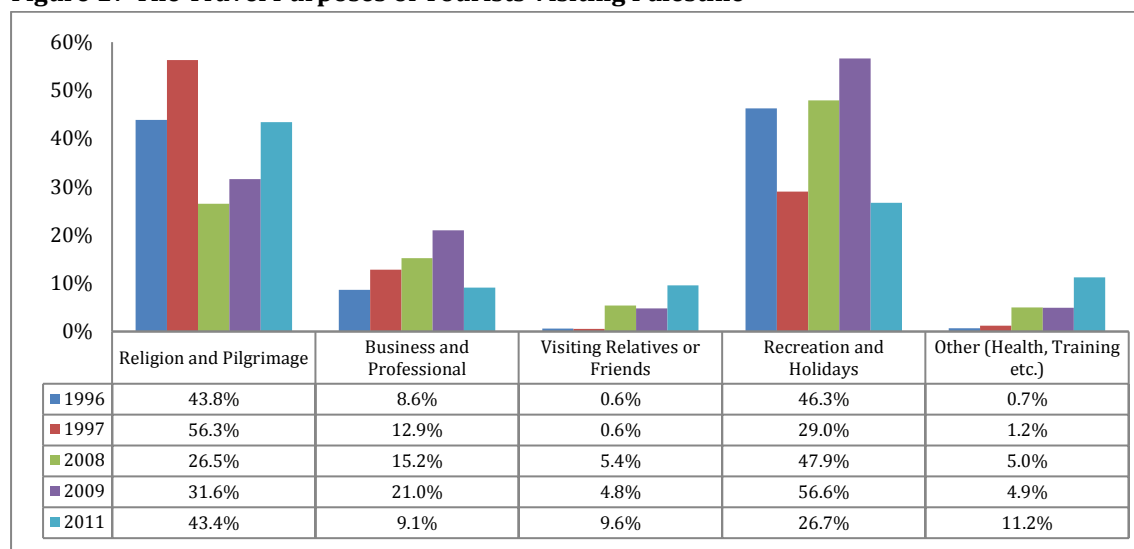
Source: By authors own, based on the data by UNWTO (various publications)

Figure 16 Average Expenditure per tourist in Jordan, Palestine and Israel (in USD)



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

Figure 17 The Travel Purposes of Tourists Visiting Palestine



Source: By authors own based on the data by PCBS and Suleiman and Mohamed (2011).

* Data for the years 1996–2009 are by PCBS while the data of 2011 are by Suleiman and Mohamed (2011).

** It should be noted that the sample of the study of Suleiman and Mohamed (2011) is very low (198 people).

The Pilgrimage tourism is of great importance for building Palestinian brand¹⁵⁶. Pilgrims, often, seek simple accommodation and catering services and do not spend much, because their basic travel motivations are spiritual and they often have relatively low budget. Therefore, they are less likely to be affected by promotional activities¹⁵⁷. Moreover, religious tourism is mostly controlled by Israeli companies; therefore, benefits for Palestinians are much more limited¹⁵⁸. The pilgrims are mostly Christians and come from North America and Europe. Even though less than 10% of tourists visiting Al Quds are Muslim pilgrims (due to political reasons), the global Muslim population offers huge potential. The increase in the number of Muslim visitors is also significant for strengthening solidarity between the Palestinians and the Muslim world. In terms of Muslim tourists who accommodate 3 nights on the average, Turkey, Indonesia, and Malaysia may be the largest market¹⁵⁹.

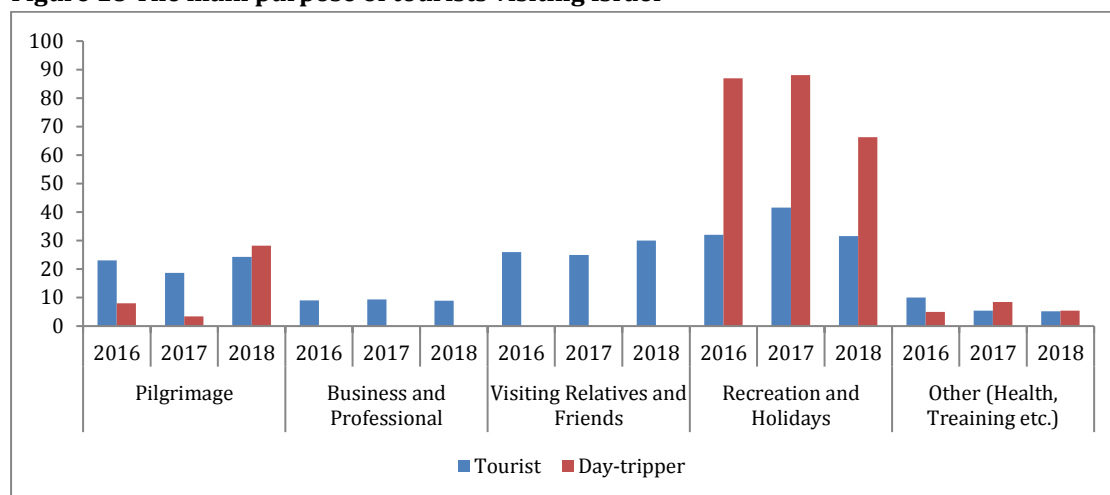
¹⁵⁶ SESRIC, n.d.

¹⁵⁷ MoNE, 2014.

¹⁵⁸ Isaac and Eid, 2019, 1499–1522.

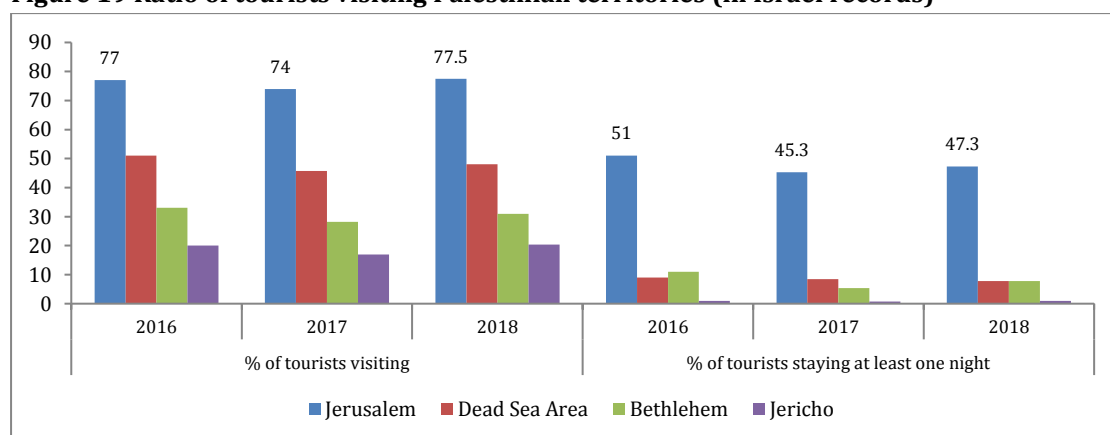
¹⁵⁹ SESRIC, n.d.

Figure 18 The main purpose of tourists visiting Israel



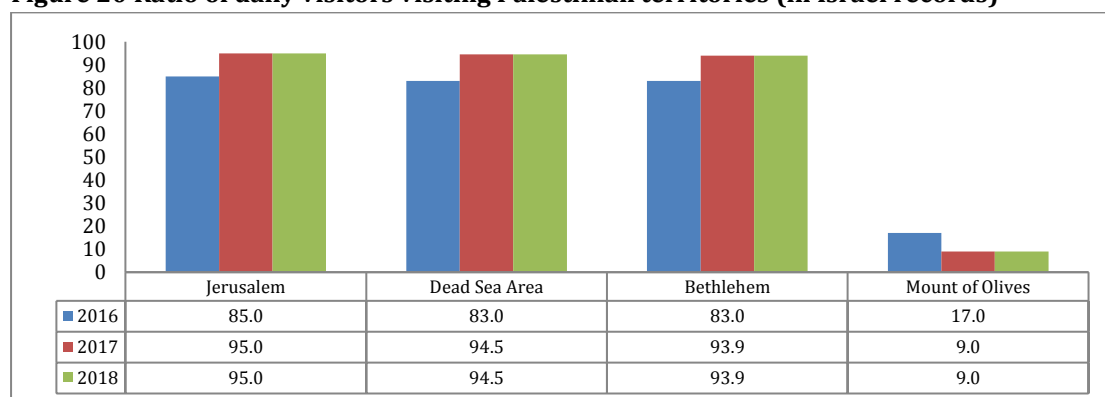
Source: By authors own based on the data by Israel Ministry of Tourism (2017, 2018, and 2019).

Figure 19 Ratio of tourists visiting Palestinian territories (in Israel records)



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

Figure 20 Ratio of daily visitors visiting Palestinian territories (in Israel records)



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

Based on the 2018 figures, approximately more than 200,000 excursionists (daily visitors without overnight stay) visited Al Quds, Dead Sea, Bethlehem and about 20,000 of them visited Mount of Olives as shown in Figure 20.

4.3.2. Figures of Al Quds and Comparisons with Other Palestinian Regions

Although, retail, wholesale and industry activities are, to some extent, important, the biggest contribution to the Al Quds GDP comes from the service sector. The economy of Al Quds is increasingly based on services such as banking, telecommunications, insurance, transportation and hotels and restaurants. While the contribution of the service economy to the GDP was around 40% in the 2000-2002 period, it reached 53% in the 2014-2016 period (Table 3). The most important share in the service sector belongs to tourism. Tourism and related sectors contribute more than USD 40 million to the Al Quds economy and meet 20% of Al Quds employment alone¹⁶⁰. On the other hand, the housing and construction sector contributed 10% to the Al Quds' GDP in 2000-2002 period, but it decreased to 2.8% from 2014 to 2016. Just these figures alone disclose the fact that Israeli policies and practices make it very difficult for tourism companies to maintain their businesses in Al Quds.

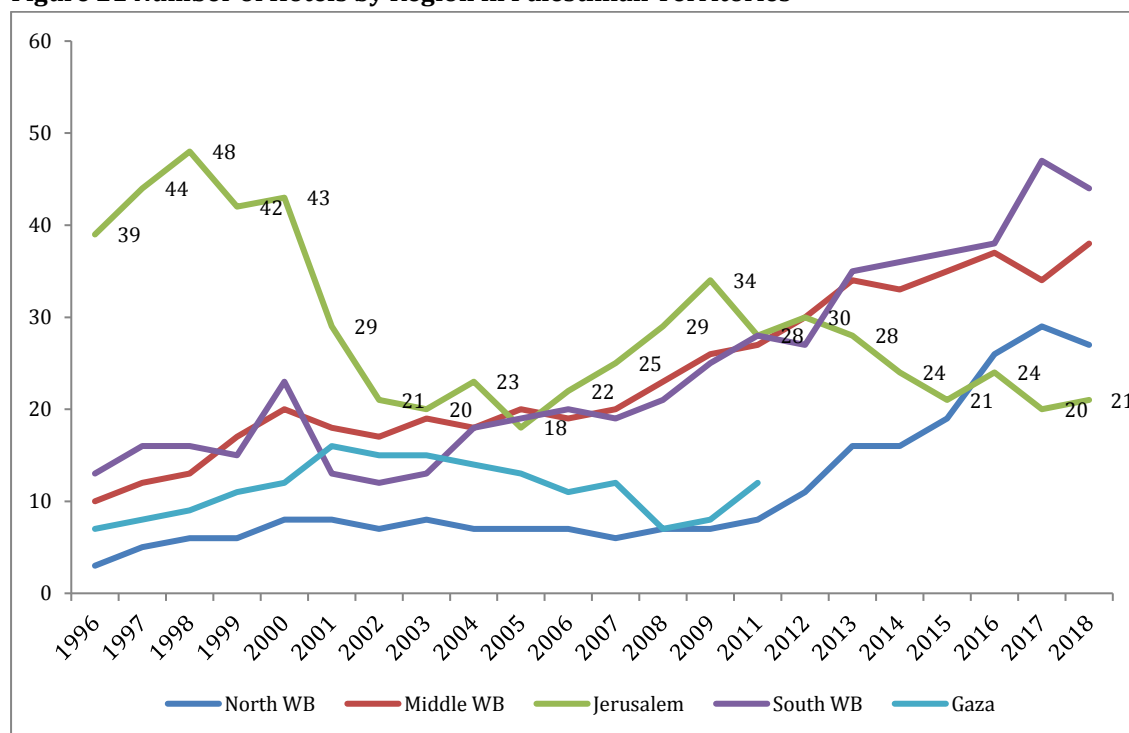
Table 3 Contributions of economic sectors to East Jerusalem GDP in 2000-2002 and 2014-2016

Sector	2000-2002 (%)	2014-2016 (%)
Agriculture	1.0%	0.3%
Industry	17.0%	18.0%
Housing and Construction	10.0%	2.8%
Retail and wholesale	15.0%	24.0%
Transport and Storage	14.0%	2.2%
ICT	0.1%	0.1%
Public administration and other services	3.0%	0.1%
Services	40.0%	53.0%

Source: Jafari and Abdullah, 2019

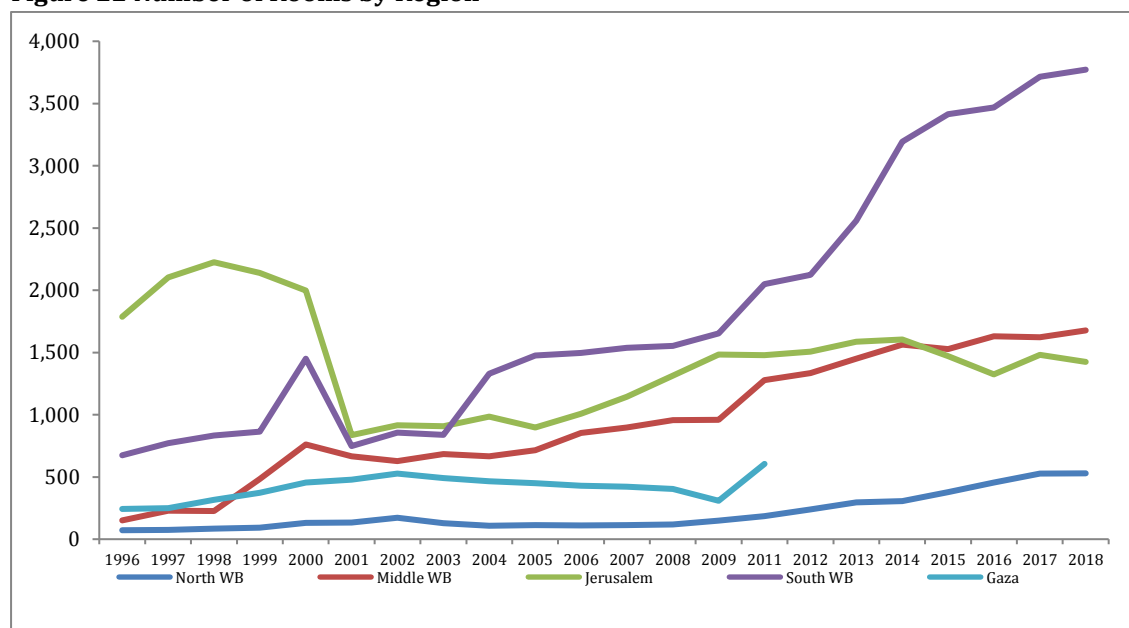
¹⁶⁰ Jafari and Abdullah, 2019.

Figure 21 Number of Hotels by Region in Palestinian Territories



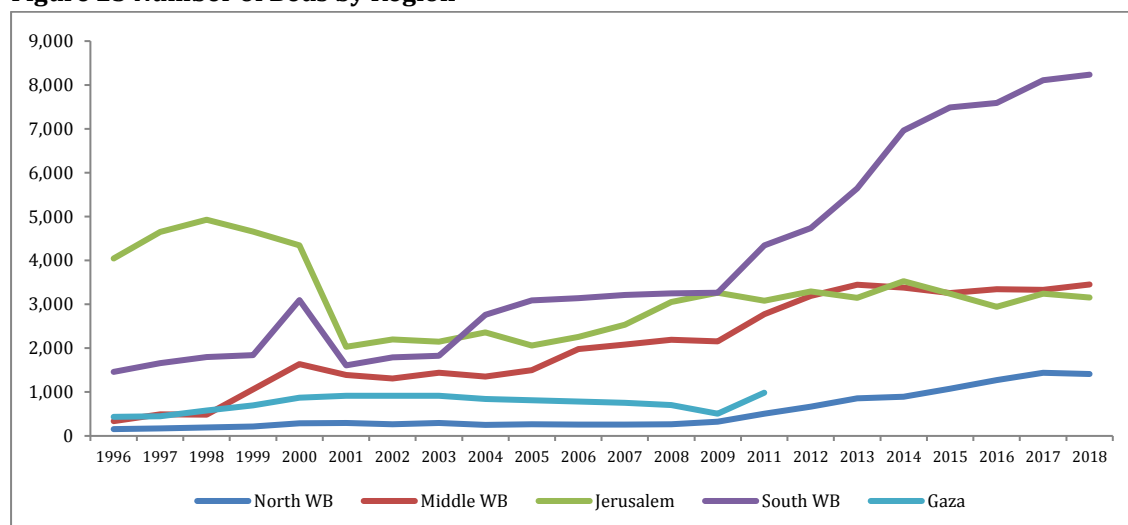
Source: By authors own based on the data by PCBS

Figure 22 Number of Rooms by Region



Source: By authors own based on the data by PCBS

Figure 23 Number of Beds by Region



Source: By authors own based on the data by PCBS

While Al Quds dominated Palestinian tourism until the late 2000s, in the following period and especially after 2011, South West Bank and the Central West Bank came to the forefront. PCBS records indicate that the number of hotels in Al Quds was 48 in 1998; it decreased from 34 in 2009 to 21 in 2018. It is possible to observe the same for the number of rooms and beds. In terms of the number of rooms, while Al Quds ranked first before 2001, in the following years the South West Bank occupied the first rank. Moreover, since 2015, Middle West Bank follows South West Bank, and Al Quds settles only at the third rank. On the other hand, Al Quds used to have the highest bed capacity until 2004 but also dropped to the 3rd place after 2015.

Tour operators owned by Palestinians organize and encourage incoming tours, beyond promoting Palestine. Even though they exist in the market for a long time, they have increased their market only for the last twenty years. Previously, the sector was entirely in the hands of Israeli companies. However, Palestinian companies have to work with very low-profit margins in order to get more shares from the market¹⁶¹. Moreover, Israel's own records point out that (as shown in Table 4), although the number of tourists is in decline, tourists' most satisfactory experience is to visit Al-Aqsa Mosque. In other words, Al-Aqsa Mosque is very unique cultural attraction, besides its religious importance for Muslims. Therefore, it can be stated that Palestinian tour operators and tourism businesses still have a high chance to attract higher number of tourists.

¹⁶¹ Jafari and Abdullah, 2019.

Table 4 Ratio of tourists staying at Israeli hotels and visiting Al Quds

Sites visited	% of tourists visiting Al Quds		
	2016	2017	2018
Mount of Olives	46	39.7	47.4
Al-Aqsa Mosque	9	5.9	4.7

Most satisfying experience	% of tourist
Al-Aqsa Mosque (2017-1.)	33.8
Al-Aqsa Mosque (2018-2.)	35.6

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

On the other hand, the number of restaurants operating in Al Quds has not changed much but, a small downward trend in recent years stands out (Table 5). After the number of restaurants increased from 38 in 2012 to 41 in 2014, as the result of closure of 1-2 facilities each year, the number fell to 33 in 2018. The loss in capacity is larger. In other words, large capacity facilities did not survive, while small capacity enterprises continue to operate. The overall capacity of restaurants in Al Quds was 3,535 people in 2012; they reached a capacity of 4,273 people in 2014. However, the capacity in 2018 was only 2,823 people. Compared to 2012 and 2014, the restaurants lost 20% and 34% of their total capacities, respectively. In terms of support facilities, the number of conference halls were almost stable, and in 2018, there were 30 halls with an average capacity of 80 people. Therefore, it can be noted that the infrastructure exists for small-scale meetings. However, it should be noted that swimming pools and playground/sport halls are insufficient.

Table 5 Service facilities in Al Quds

	Restaurants			Conference Halls			Parking		Lifts	Swimming Pools	Playground /Sport Hall
	Number	Capacity	Average Capacity	Number	Capacity	Average Capacity	Number	Capacity			
2012	38	3,525	92.8	37	2,856	77.2	12	1,370	31	2	2
2013	34	3,200	94.1	33	2,746	83.2	11	1,340	29	1	2
2014	41	4,273	104.2	38	3,156	83.1	18	490	31	2	2
2015	38	4,073	107.2	32	2,898	90.6	16	270	29	2	2
2016	37	3,573	96.6	36	2,565	71.3	17	590	25	2	2
2017	36	3,803	105.6	--*	2,189	12.3	--*	282	30	2	2
2018	33	2,823	85.5	30	2,368	78.9	17	470	20	1	2

Source: PCBS (several years)

* The figure is not provided since it is found to be inconsistent with other data.

Analyzing the distribution of tourists visiting Palestine by region (Figure 24) reveals that Al Quds used to play a major role and hosted the majority of tourists during 1990s and until the late 2000s. However, it lost this role since 2009 (without ignoring the fact that the role for producing statistics is transferred to Israel and that Palestinian state cannot compile quality data from Al Quds), and South-West Bank stood out among the regions and increased the number of tourists. In 2018, approximately 120,000 tourists stayed at Palestinian hotels in Al Quds while this number was around 410,000 in South West Bank. When the proportional change is analyzed, the decline appears more clearly. While 73.6% of the tourists who visited Palestine in 1998 stayed in Al Quds, this figure fell below 50% in 2003, and (despite it hosted again more than 50% of tourists in 2006), Al Quds fell to the second place after South West Bank by hosting %36 of international tourists. The decline continued also in the following years and the rate of tourists staying in Al Quds was only 18.6% in 2018.

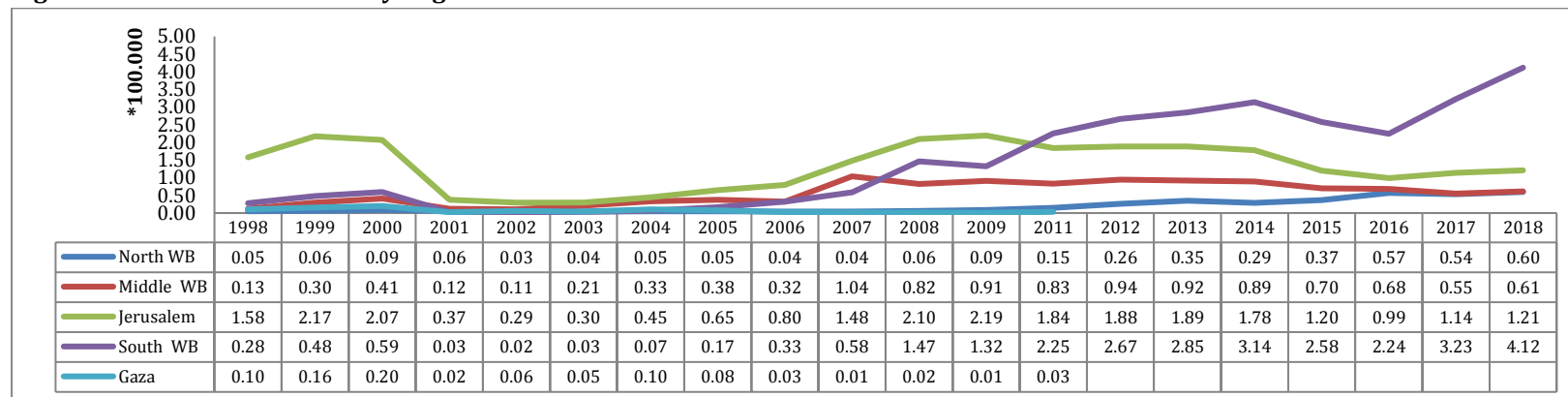
This proportional decrease can also be interpreted positively inferring that tourism activities and therefore revenues are spread throughout Palestine rather than concentrating in one city. It should not be forgotten that these shares include only the tourists who stayed in the facilities operated by the Palestinians and that Al Quds is also popular among tourists and day-to-day visitors staying on the Israeli side. Namely, a study by COMCEC¹⁶² stated that 2,173,200 and 2,233,000 people visited Al Quds respectively, in 2015 and 2016. However, these are not reflected in the statistics on accommodation. In any case, the fact that tourism figures in Al Quds continuously decline emphasizes that it is necessary to take urgent measures. Moreover, there are no significant differences between regions in terms of the average length of stay (Table 6), except for some years. Likewise, the average length of stay in Al Quds is in line with the Palestinian average, and though the length of stay falls prominently in some years (e.g., 2005), it generally varies between 2-3 nights.

In the studies conducted by PCBS in 2008 and 2009, (there is no data for the following years), the main motivations of visitors to Al Quds were recreation and holiday and the religious purposes took the second position (Figure 26). Therefore, for Al Quds to compete with West Jerusalem and other cities and be preferred, its product and variety of activities and quality should be ensured at a high level since the quality image of a destination is an integral and effective element for decision-making of the travelers¹⁶³.

¹⁶² COMCEC, 2017.

¹⁶³ Çakmak and Isaac, 2012, 124 – 133.

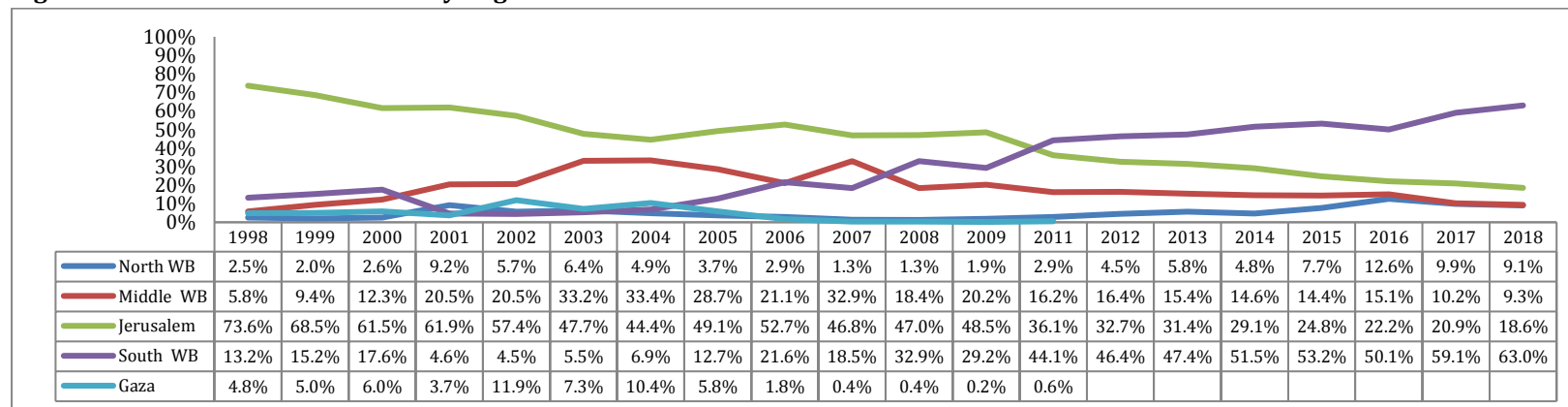
Figure 24 Number of Tourists by Region in Palestine



* There is no data for Gaza for 2012 and later.

Source: By authors own based on the data by PCBS

Figure 25 Share of Tourist Arrivals by Region in Palestine



* There is no data for Gaza for 2012 and later.

Source: By authors own based on the data by PCBS

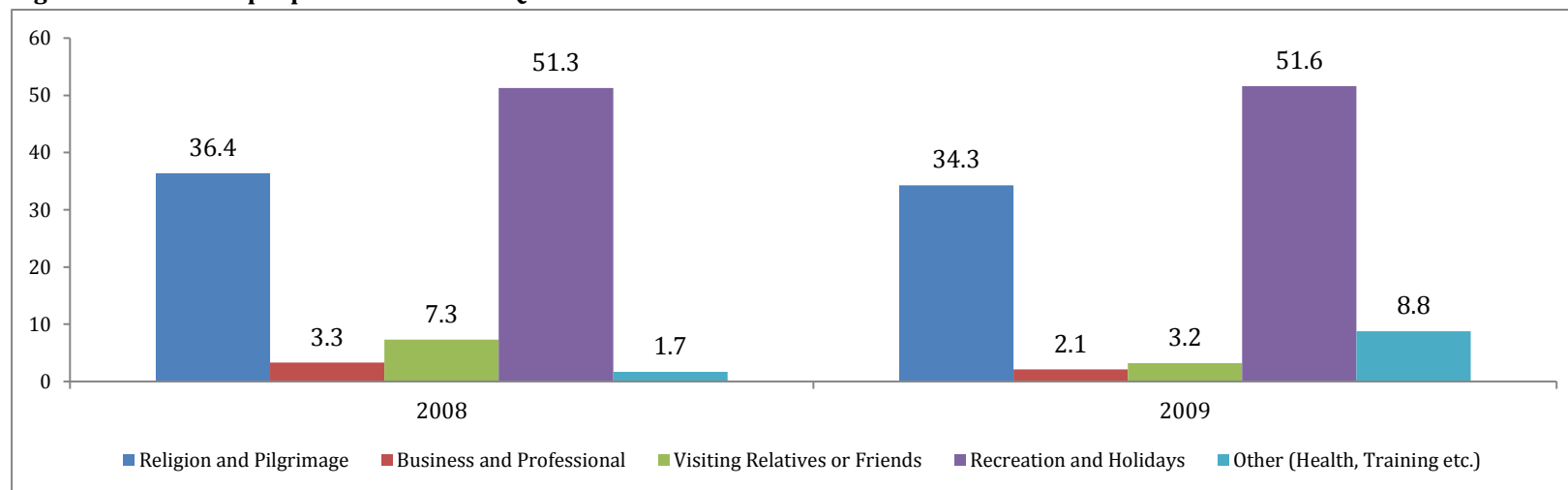
Table 6 Average length of stay by region

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2011	2012	2013	2014	2015	2016	2017	2018
North WB	2.5	2.4	2.2	3.9	9.7	6.4	3.9	0.1	2.0	1.9	2.2	1.8	1.5	1.5	1.4	1.4	1.4	1.5	1.6	1.6
Middle WB	3.0	2.5	2.2	2.7	3.0	2.9	2.3	0.1	1.7	1.3	1.8	2.0	2.7	2.6	2.8	2.9	3.5	3.4	3.4	3.0
Jerusalem	2.6	2.7	3.2	3.1	3.1	3.1	2.9	0.6	2.8	2.7	2.8	2.3	2.3	2.2	1.9	2.6	3.2	3.3	3.0	2.9
South WB	4.0	3.6	3.3	2.9	2.5	2.5	3.0	0.2	2.7	2.3	2.5	2.5	2.5	2.4	2.8	2.5	2.9	3.0	3.0	2.9
Gaza	2.7	2.8	2.4	3.3	2.1	2.5	2.1	0.3	3.0	2.4	4.1	1.3	2.9							
Total	2.8	2.8	3.0	3.1	3.3	3.2	2.7	0.4	2.5	2.1	2.5	2.3	2.5	2.3	2.4	2.5	2.9	2.9	2.9	2.8

* There is no data for Gaza for 2012 and later.

Source: By authors own based on the data by PCBS

Figure 26 The main purpose of visits to Al Quds



Source: By authors own based on the data by PCBS



5. Supply Analysis and Demand Analysis

5.1. Tourist Opinions

5.1.1. Analysis of Comments on Online Reservation Sites

Although there is no specific study for Al Quds, the studies in the literature reviewing the perspectives of the tourists visiting Palestine reveal that visitors' views on Palestine have been intensely positive about religious and historical attractions such as churches, mosques and old cities, and natural attractions such as olive trees, rural areas, hills and valleys¹⁶⁴. It is also often mentioned that the Palestinians are friendly and hospitable, and in connection with this, perception about the local culture and cuisine is positive¹⁶⁵. However, it should also be stated that awareness of the visual reflections of the local culture (e.g., local dances, clothing style etc.) is not at the desirable level¹⁶⁶ and therefore the majority of the tourists cannot observe/experience them. Moreover, in contrast to negative security perception in general media, during and after their visit, tourists think Palestine is a very safe place.

It can be stated that the main problem for the development of Palestinian tourism is Israeli occupation and practices. Studies have made it clear that the vast majority of tourists have complaints and reservations about Israeli occupation and practices. For example, Çakmak and

¹⁶⁴ Isaac and Eid, 2019, 1499–1522.

¹⁶⁵ Çakmak and Isaac, 2012, 124 – 133.

¹⁶⁶ Isaac and Eid, 2019, 1499–1522.

Isaac¹⁶⁷ state that the Separation Wall and The Refugee Camps are emphasized as much as historical values. Beyond that, Israeli checkpoints, transportation within and between Palestinian cities are frequently mentioned as a problem. Isaac and Eid¹⁶⁸ (2019) state that visitors and/or individuals who have the intention to visit Palestine are annoyed by the questions of the Israeli border police. Beyond this, tourists complain about the variety and regularity of transportation opportunities in connection with Israeli practices. For example, Çakmak and Isaac¹⁶⁹ state that 98 out of 101 bloggers wrote about transportation problems and Israeli controls.

Besides, it is understood from the studies that tourists complain about the scarcity/absence of activities that they can do in leisure time and they get bored after visiting historical sites. Contrary to the positive perception of historical and natural areas, the quality of urban infrastructure and services are perceived as weak and tourists indicate a need to develop the quality in tourism services¹⁷⁰.

Today, tourists consider opinions shared on the internet rather than face-to-face advice from family or friends. Before deciding whether to buy the products or services, 81% of customers make online research and in particular, 61% of them examine product/service information, more than half of them read user reviews or comments on websites. Therefore, electronic word-of-mouth (e-WOM), which should be interpreted as spread of news or comments on the internet, have considerable impact on consumers' decision either positively or negatively¹⁷¹.

In this context, views of tourists who have visited Al Quds and stayed at the facilities operated by Palestinians were reviewed on major internet sites. "Travelblog.org", "Tripadvisor.com", "Booking.com", "Expedia.com", and "Trivago.com" were selected for this purpose. In the review conducted on 20.06.2020, it was determined that there were no posts about the West Bank or Palestine on Travel Blog.org, while there were 447 pages about West Bank Palestine on Tripadvisor.com. In those pages, issues of security and difficulties in mobility (checkpoints) in Palestinian territory were mentioned, similar to the results of previous studies. Particularly, military checkpoints, safety/security in Palestine, the regularity of transportation were questioned. Unfortunately, there were very few messages related to natural and historical beauties and attractions. The fact that there was no hotel from Al Quds among the top 10 West Bank hotels determined by the ratings of TripAdvisor.com visitors, is another remarkable point.

Accommodation facilities are attempted to be identified through the addresses of the facilities displayed on "Booking com", "Expedia.com" and "Trivago.com" as well as among Arab Hotel Association (AHA) members. As a result, 39 accommodation facilities were identified, 8 of which serve as guesthouses, hostels, apartments and 31 of which serve as hotels. Although some facilities were listed on all three sites, others were only displayed on one or two sites. Therefore,

¹⁶⁷ Çakmak and Isaac, 2012, 124 – 133.

¹⁶⁸ Isaac and Eid, 2019, 1499–1522.

¹⁶⁹ Çakmak and Isaac, 2012, 124 – 133.

¹⁷⁰ Ibid. 124-133.

¹⁷¹ Çakmak and Isaac, 2012, 124 – 133.

the numbers analyzed on each platform show variations. 26 hotels were examined on Expedia.com and Booking.com, while opinions about 23 hotels were analyzed on Trivago.com. On the other hand, the numbers of guesthouses, hostels and apartments examined were 2, 6 and 5 for Expedia.com, Booking.com and Trivago.com, respectively. Based on the fact that young people and travelers who have different motivations and expectations from the mainstream tourists, prefer guesthouses, hostels and apartments¹⁷², they were examined separately.

Scores given to facilities in Booking.com and Trivago.com sites are over a 10-point scale, while it is a 5 point scale in "Expedia.com". Scoring system of the three sites has been normalized by doubling the scores on the "Expedia.com". On Expedia.com, comments are made on five categories: "cleanliness, service and staff, amenities, property condition, and overall", while, on Booking.com, the facilities assessed according to "staff, facilities, cleanliness, value for money, location, comfort, free Wi-Fi and overall". On the Trivago.com, which has the most detailed scoring, evaluations are made for "facilities, property condition, rooms, comfort, service, cleanliness, value for Money, breakfast, meals, location and overall".

While members of Booking.com and Trivago.com make similar comments, the most negative comments are generally made by visitors of "Expedia.com". Considering the scoring comprehensively, since evaluations were mostly below 8 points, it can be stated that Palestinian accommodation facilities in Al Quds are evaluated as having "average" quality and there is need for improvements in almost all categories. It is observed that evaluations about guesthouses, hostels and apartments were more positive except those on Booking.com. It can be interpreted that comments about hotels were more negative since hotel customers have higher expectations.

Tourists on the sites mostly emphasize "cleanliness and property conditions" and these issues are marked as "disliked" about the facilities, therefore, should urgently be improved. Beyond the fact that Israeli policies and restrictions are obstacles to improving the physical conditions of the facilities, the issue of cleanliness stems as a priority that Palestinian hoteliers should pay attention to and develop. The following quotations from Booking.com and Expedia.com regarding these issues would be guiding;

- *"Old establishment with a rundown feel";*
- *"The hotel is in dire need of refurbishment";*
- *"The rooms should be cleaned better";*

Moreover, also the rooms get very low scores. Examples of negative comments regarding the rooms are given below;

- *"The room carpets need upgrade bad too much dust in the room"*
- *"The room was dark, there were just a few lamps"*
- *"Some electrical plugs were not working"*

¹⁷² Cohen-Hattab and Katz, 2001, 166–177.

Having closely related to the general physical condition of the facilities, the comments and ratings about rooms and room services emphasize that they should be diversified and improved. It should also be noted that there are no major problems in technology and especially in availability of internet and many facilities received 10 points.

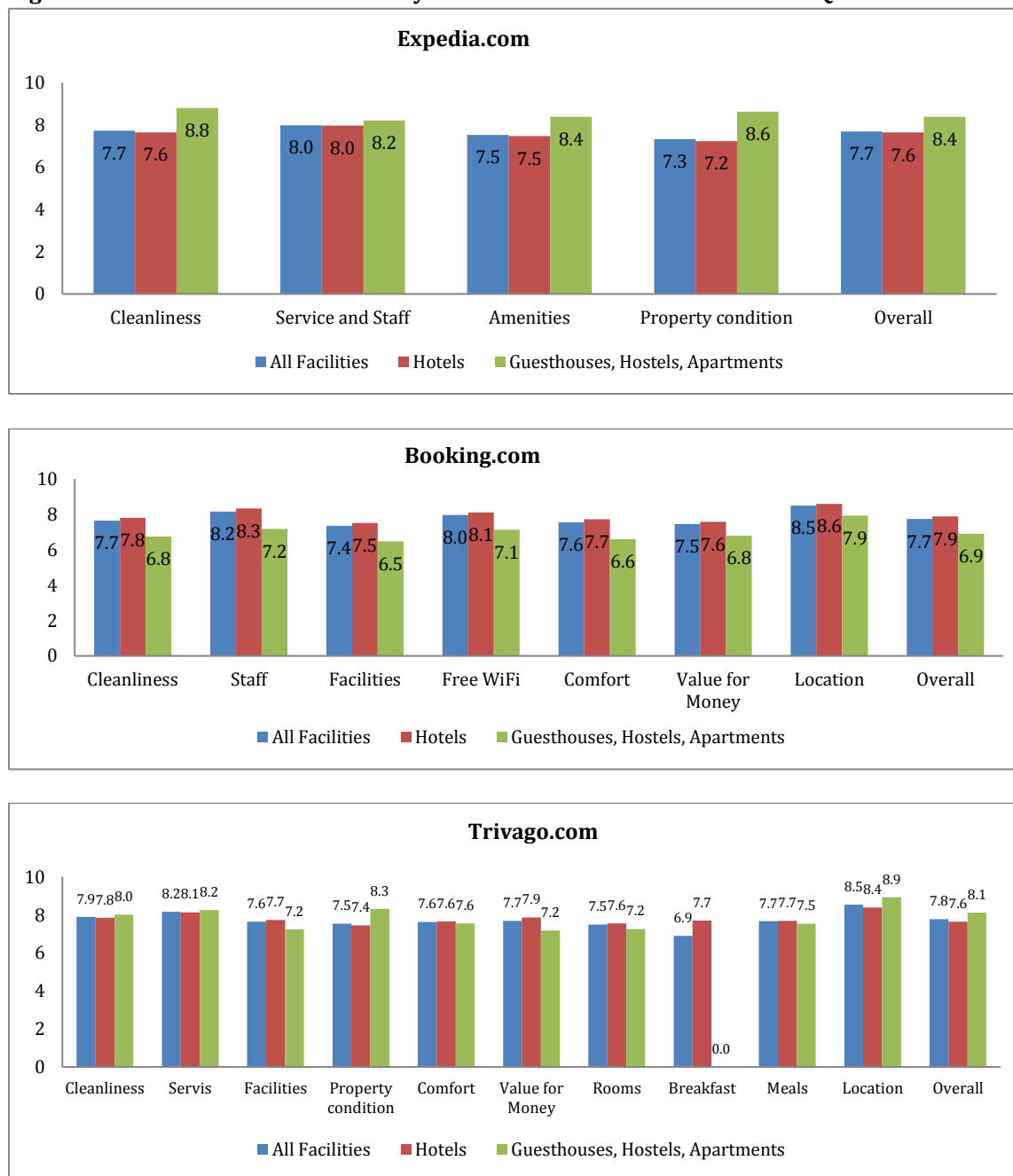
The fact that the most positive scores were given to the locations not only gives clues in terms of competitive advantage but also emphasizes that this advantage is not utilized sufficiently and may even be hampered by the quality in lodging sector. On the other hand, similar to results of the study by Çakmak and Isaac¹⁷³, tourists think that they do not get value for money with regard to Palestinian accommodation facilities. Participants in their study also stated that especially the prices of vehicles (taxis) and gifts are very high. Therefore, it is possible to note that one of the basic reasons for the constant decline in the amount of expenditure per tourist is the lack of product/service diversification and quality.

Although the service/staff satisfaction level is relatively high and there are comments that the staff is friendly and the quality of service is good, there are many complaints on the topic, as well. For example, most of the guests state that the quality of service is low and that the staff does not care about or even listen to complaints and expectations. Likewise, the complaints point out that there are many inadequacies in technical, social and managerial qualifications. Similarly, the meals which are scored only on Trivago.com are not scored as “very” satisfactory.

Considering that scores of 6, 7, 7.5, 8 and 8.5 and above in Trivago.com scoring mean as okay, fair, good, very good, and excellent respectively, the overall scorings ranging from 6.9 to 8.1 for guesthouses, hostels and apartments, and from 7.6 to 7.9 for hotels indicate not very high levels of satisfaction (Figure 27). For example, many hotels in Makkah are scored 8.5 and over and even over 9.0. On the other hand, some Jordanian facilities like camping areas, apartments and hotels are also scored over 9.5. Moreover, on Israeli side of Jerusalem, the general scorings are also higher, even 9 and over. Therefore, it is necessary to improve the physical quality of the facilities and to increase the qualifications of both management and service personnel in particular.

¹⁷³ Çakmak and Isaac, 2012, 124 – 133.

Figure 27 Reviews of tourists who stayed at accommodation facilities in Al Quds



Source: By authors own, based on the data by Expedia.com; Booking.com and Trivago.com

5.1.2. Performance Analysis¹⁷⁴

A survey form was designed to assess the experience of visitors of Al Quds rather than assessing their expectations. A comprehensive literature review was conducted to decide the items/statements of the questionnaire. The studies on perceived image of cultural areas and other destination types or on overall evaluation of the holidays or the services tourists get during their holidays were reviewed. Among the expressions used in these studies, suitable ones for Al Quds were compiled and adopted. In this context, the items and scales were formed, utilizing mainly Knutson et al (1990)¹⁷⁵, Frochot and Hughes (2000)¹⁷⁶, Radder and Wang (2006)¹⁷⁷, Albacete-Saez et al (2007)¹⁷⁸, Tasci et al (2007)¹⁷⁹, Wilkins et al (2007)¹⁸⁰, Bigne Alcaniz et al (2009)¹⁸¹, Namkung et al (2009)¹⁸², Tsang et al (2010)¹⁸³, and Kim et al (2012)¹⁸⁴. The survey form was published on-line and its link was distributed to client lists of the Palestinian stakeholders and to general audience through social media accounts created by the research team. It was possible to collect data from 33 respondents. On the form, information on age and country of residence of the respondents were collected by open-ended questions and other demographic data was collected based on specific classifications. Features offered by Al Quds and services delivered were assessed based on a 7 point Likert scale (1: Definitely disagree, 2: Mostly disagree, 3: Slightly disagree, 4: Neither agree, nor disagree, 5: Slightly agree, 6: Mostly agree, 7: Definitely agree). The survey form is given in Annex 1. Demographic characteristics of the respondents and the mean value of the responses are given in tables below.

Table 7 Demographic profile of respondents

Gender		
	<i>Frequency</i>	<i>%</i>
Female	8	30
Male	19	70
Total	27	100

Marital Status		
	<i>Frequency</i>	<i>%</i>
Single	8	24.2
Married– Long Term Relationship	25	75.8
Total	33	100

¹⁷⁴ In the spring of 2020, tourism activities virtually stopped all over the world and Israel closed its borders on 19.03.2020. Borders were still closed at the time of preparation of this document. Consequently, the planned field study which included face to face surveys with tourists could not be performed and this activity is replaced with analysis of the views of tourists which have previously visited Al Quds in order to conduct a performance analysis based on tourist evaluations on the attractions of Al Quds and on the services provided in location. The IPCA (Importance Performance Competitor Analysis) which was initially planned was not possible to conduct because the lack of quantitative data which could have been obtained. Considering that online surveys do not attract many respondents, the researchers decided that a statistically significant analysis would not be possible with low number of responses and relatively low reliability of data provided on line especially when it is conducted after a certain period of time following the visit.

¹⁷⁵ Knutson, Stevens, Wallaert, Patton, and Yokoyama, 1990, 277-284.

¹⁷⁶ Frochot and Hughes, 2000, 157-167.

¹⁷⁷ Radder and Wang, 2006, 554-562.

¹⁷⁸ Albacete-Saez, Fuentes-Fuentes, and Llorens-Montes, 2007, 45-65.

¹⁷⁹ Tasci, Gartner, and Cavusgil, 2007, 1529-1540.

¹⁸⁰ Wilkins, Merrilees, and Herington, 2007, 840-853.

¹⁸¹ Bigne Alcaniz, Sanchez Garcia, and Sanz Blas, 2009, 715-723.

¹⁸² Namkung, Jang, Almanza, and Ismail, 2009, 375-392.

¹⁸³ Tsang, Lai, and Law, 2010, 306-323.

¹⁸⁴ Kim, Hallab, and Kim, 2012. 486-505.

Occupation		
	<i>Frequency</i>	<i>%</i>
Student	3	9.1
Retired	4	12
Civil servant	7	21
Wage employee	6	18
Self employed	4	12
Business person- Employer	9	27
Total	33	100

Education		
	<i>Frequency</i>	<i>%</i>
High school	2	6.1
Associate degree	3	9.1
Bachelor	10	30
Master- Doctorate	18	55
Total	33	100

Monthly Income (Euro)		
	<i>Frequency</i>	<i>%</i>
3000 or less	14	54
3001-5000	8	31
5001 or more	4	15
Total	26	100

Age		
	<i>Frequency</i>	<i>%</i>
25 or less	4	12.1
26- 35	6	18.2
36- 45	6	18.2
46- 55	11	33.3
56- 65	4	12.1
65 or more	2	6.1
Total	33	100

Country of Residency		
	<i>Frequency</i>	<i>%</i>
Austria	17	51.5
Chile	1	3
Germany	1	3
Italy	1	3
Jordan	1	3
Luxembourg	1	3
Palestine	1	3
Saudi Arabia	1	3
Turkey	9	27.3
Total	33	100

It is observed that most of the respondents were male over 36 years of age. However, considering the variety of their occupations, it can be concluded that they represent a wide spectrum of perspectives. In addition, it is also observed that about 85% of the respondents have less than 5000 Euro monthly income and visitors of Al Quds generally have higher educational background (Table 7).

Table 7 depicts that great majority (81.8%) of respondents visited Al Quds in the last five years and consequently their recollection of their experience and their impression on the site can be considered up-to-date. It is observed that most of the respondents visited Al Quds for religious purposes including pilgrimage and for holiday and recreation purposes with a balanced distribution between the two motivations. However, it should also be stated that travel for business purposes has a considerable share among the motivations for visit. Average duration of stay was identified to be 2 days or more as it is the case in PCBS statistics. This leads a conclusion that the participants had sufficient time to experience services offered by accommodation and F&B facilities, enjoy activities in the city, and utilize urban services and the information they provide would serve for the purposes of the study. It can also be concluded that the respondents were mostly from Europe depicting a similar distribution as compared to visitor profile of Al Quds.

Table 8 Information about Al Quds visit of respondents

Last Visit			Purpose of Visit		
	Frequency	%		Frequency	%
In the last five years	27	81.8	Religion and pilgrimage	13	39.4
More than five, less than ten years ago	2	6.1	Recreation and holidays	14	42.4
More than ten years ago	4	12.1	Business	5	15.2
Total	33	100	Visiting relatives or friends	1	3.0
			Total	33	100

Length of Stay			Visit covered West Jerusalem		
	Frequency	%		Frequency	%
Did not stay (daily visit)	6	18.2	No	16	48.5
Overnight	5	15.2	Yes	17	51.5
Two nights or more	22	66.7	Total	33	100
Total	33	100			

Table 9 Means and Modes of Responses by Groups of Items

		Mean	Mode
Attractions	There were many and interesting historic places to visit	6,55	7
	There were many attractive natural sceneries	5,76	7
	Palestinian culture/customs were very attractive	5,91	7
	Palestinian local cuisine was very appealing	5,70	7
	Palestinian people were very friendly	6,03	7
Contact with locals /culture	During my visit, I contacted with the local people	5,64	7
	During my visit, I experienced local food	6,39	7
Accessibility	Historic sites were easily accessible	5,79	6
	Natural attractions were easily accessible	4,74	5
Urban Spaces and Infrastructure	East Jerusalem was clean	3,79	2
	Quality of urban infrastructure was good	3,97	5
	Local transport was well organized	4,06	4
	It was easy to access to information about the attractions that I am interested in	4,47	5
	Direction signs to show the attractions, facilities and activities were clear and helpful	4,69	3 ^a
	Public spaces were attractive	5,27	5
	East Jerusalem was safe	5,36	6

Table 9 Means and Modes of Responses by Groups of Items (continued)

		Mean	Mode
Accommodation	Web-site of accommodation facilities seemed trustworthy regarding online payments	3,91	2
	The accommodation facilities had user-friendly online reservation system	4,00	2
	The accommodation facilities had attractive decoration and were well equipped	4,23	5
	Staff of the accommodation facilities were qualified	4,23	4
	Web-site of accommodation facilities provide in-depth information	4,26	5
	The accommodation facilities were clean and hygienic	4,32	5
	Staff of the accommodation facilities were courteous	4,97	5
F&B	Staff of food and beverage facilities were qualified	4,24	3
	The food and beverage facilities were clean and hygienic	4,48	6
	The food and beverage facilities had attractive decoration and were well equipped	4,64	5
	The food and beverage facilities offer a wide variety of dishes and refreshments	4,97	7
	The staff of food and beverage facilities were courteous	5,03	6
	The food and beverage were reasonably priced	5,18	6
	The food and beverage facilities offer a good variety of local cuisine	5,61	6
	The quality of the food was satisfactory	5,64	6
Activities	There were many attractive fairs, festivals and exhibitions to attend	3,24	4
	There were many open-air (outdoor) activities to join and enjoy	3,67	4
	There were diversified shopping opportunities	3,81	2
	The shops were open when I wanted to shop	4,31	4 ^a
	The number and quality of museums were satisfactory	5,06	5
Shopping	Nightlife/entertainment opportunities were satisfactory	3,19	4
	Sport opportunities and facilities were satisfactory	3,28	4
	The shops offered a wide variety of goods	4,19	2 ^a
Travel Agencies	Travel agencies provided qualified services	5,03	4 ^a
	Travel agencies provided in-depth and satisfactory information	5,13	4

Overall	I intend to revisit East Jerusalem	5,76	7
	Overall, I am satisfied with my experience in East Jerusalem	6,09	6
	I intend to recommend East Jerusalem to my friends and relatives	6,18	7
	My visit to East Jerusalem was exciting	6,27	7

Mode: Refers to the most marked option.

a. Multiple modes exist. The smallest value is given

Considering the average scores and mostly marked scales of agreement, it is observed that presence of nightlife/entertainment, fairs, festivals, sport activities/facilities and outdoor activities received the lowest ratings (Table 9). It should also be noted that the mostly marked option 4 (neither agree, nor disagree) may also imply that the respondents either did not experience these services/events or even if they experienced, they were not much satisfied. Findings point out the areas where urgent improvements should be made for developing tourism. Mostly disagreed statements, "East Jerusalem was clean", "there were diversified shopping opportunities", and "web-site of accommodation facilities seemed trustworthy regarding online payments" highlight the major dissatisfaction about Al Quds. On the average, the statements: "the accommodation facilities had user-friendly online reservation system", "local transport was well organized", "the shops offered a wide variety of goods", "staff of the accommodation facilities were qualified", "staff of food and beverage facilities were qualified", "web-sites of accommodation facilities provide in-depth information", "the shops were open when I wanted shopping" and "the accommodation facilities were clean and hygienic" received scores around 4 (neither agree, nor disagree) implying that, although the views about these items were not negative, there was not much agreement with those statements either. The mostly positive response was the "richness in historic places" which underlines the attractiveness of Al Quds. Although there are some negative perceptions about services delivered or activities, in general, tourists appraise their visit to Al Quds quite positively and they are very likely to recommend Al Quds to others. All these mean that with "small" improvements it would be possible to increase satisfaction level and loyalty of tourists.

Table 9 points out that the historical, natural and cultural attractions of Al Quds, which are perceived as very positive. Nevertheless, although the most positive responses were on historical values, it is necessary to improve perceptions of local culture and cuisine, in other words, to ensure that tourists have more intense contact with locals. The fact that the average of the responses about contact with local people is between "Agree–Mostly agree" supports this statement. Moreover, beyond the fact that average of the responses about accessibility of natural sites was 4.74, the difference with the average of the responses about access to historical sites (5.79) indicates that there is room for improvement in this regard.

On the other hand, the low average scores for urban spaces and infrastructure indicates that the most negative perception was on the cleanliness of the city and quality of urban infrastructure. Hesitant perception on local transportation with average score of (4) may be an indication that

participants mostly travelled with vehicles provided by their tour operators and did not attempt to use local transportation services.

Statement on signing and labelling in the city scored close to positive on the average (“slightly agree”) but the most marked response was on 3 (slightly disagree) which indicates that there is a need of improvement in this matter as well. Most positive response in the urban space group was for the security of the city and the attractiveness of public areas but when considered with the reviews collected on internet sites, there are still some problems regarding the security perception of the city and visitors do not feel comfortable because of security measures such as checkpoints.

Most negative perception regarding accommodation facilities was for their web sites indicating their improvement would contribute to the perceptions of visitors. Unfortunately, none of the average values of the responses for the statements about accommodation facilities indicated high satisfaction levels. The most positive perception was about the hospitality of the staff (with a mean of 4.97) but in terms of qualifications of the staff, the perception was lower (mean 4.23). Considering that accommodation facilities are one of the most important elements of tourism, some urgent intervention is needed in this area.

F&B facilities exhibit a similar profile in terms of perceptions of tourists. Their average scores were between 4.24 and 5.64 and they indicate that the participants of the survey do not have very positive perception about these facilities. The most negative view regarding these facilities was the qualification of staff pointing out the need for training for the staff as it is the case in accommodation facilities. Tourists think that the facilities are not very clean, they are not very attractively decorated, and they do not offer a wide variety of dishes and refreshments. Even though the highest number of “definitely agree” responses was for the presence of variety of dishes and refreshments, low average score (around 5) for this statement indicates that there was also negative perception for this item. The fact that most positive responses were for the rich local cuisine gives clues that food and beverage sector has high potential for the tourism in Al Quds and that improving the quality of facilities together with increasing capacity of the staff would definitely increase the tourism revenues.

As previously stated, most negative responses were received for the statement groups on activities and shopping. Perception about the museums was relatively positive but there is considerable dissatisfaction about the availability of outdoor activities, nightlife, and shopping. In this respect, participants mostly complain about activities that can be done at night, scarcity of shopping places and limited products and services offered to tourists.

Perception about travel agencies were on the average mostly accumulated at score 4 (neither agree nor disagree) indicating that there is neither negative nor positive perception about travel agencies. A conclusion about travel agencies in Al Quds is not possible based on this evaluation since it is not possible to conclude whether the respondents were clients of Palestinian or Israeli agencies.

In spite of considerable number of negative responses, the overall satisfaction level of participants about their visit to Al Quds is very high as indicated by 7 (definitely agree) which was marked the most by the respondents. This is an indication of high potential for further improvement of satisfaction level of tourists, and consequently possibility of increasing tourism revenues, with small intervention on problematic areas. Low level of agreement for intention to revisit Al Quds should not be discouraging as it is possible to interpret this as the visitors visit the location as part of a mission and once they complete their mission they prefer to see other places in the world. It should also be noted that the average score for the intention to revisit is not very low and it would be possible to increase peoples' intention to revisit with improving quality and variety of services. It is clear that with effective and comprehensive measures, the tourism in Al Quds can attain very high levels.

A regression analysis is conducted to investigate the consistency between the responses on general satisfaction levels on the survey form and responses to other statements. In other words, factors affecting respondents' position on general satisfaction, intension for revisit, and recommendation to others are tried to be identified. Regardless of the fact that the sample size is restricted and the conclusion will not be scientifically reliable, stepwise regression was used to derive some guidance for decision makers. Statistically significant interactions (Anova Sig. < 0.05) obtained as the result of the analysis are given in Annex 2.

The analysis shows that experiencing local food has the highest effect on participants' statement of visiting Al Quds as "exciting". This factor alone explains 34% of the perception. Moreover, it is seen that 1-unit increase in the experience of local food of the visitors would contribute 0.607 units to finding Al Quds "exciting" by the visitors. This suggests that the tourism sector should promote local food more and ensure that it is served to visitors by preserving its authenticity.

Visitors want to experience authenticity. The experiences of a trip are shared with others with passion. This should also be considered when developing offers¹⁸⁵. An attractive living space for locals, guests and companies is characterized by infrastructural aspects and quality of life. Health care and cultural offerings and the quality of leisure time are prominent. The attractiveness of a living space is the basis for the development of a tourism potential because travelers are increasingly longing to feel the specific atmosphere of the location, the local people and want to smell, taste and enjoy what is typical about the place. Travelers no longer want to be tourists, but rather temporary locals who have the feeling of visiting friends or old acquaintances. For tourism offers, this means that good feelings, warmth, taste, smell and security must be blended. The perception of luxury has changed: the focus is on how things and moments feel and not how much they cost. In tourism, this can create places where guests can find everything they need and where they feel at home for the duration of their stay, places where they can return home with their rhythms and rituals¹⁸⁶.

¹⁸⁵ Heuwinkel, *Tourismussoziologie*, 2019, 81.

¹⁸⁶ Siebeck, 2018, 125.

The analysis also shows that attractiveness of the public places and price of food and beverages have effect on the satisfaction level experienced by visiting Al Quds. Attractiveness of public places contributes 44% of satisfaction and this share increases to 57% with the inclusion of food and beverage prices. The analysis revealed that one-unit increase in attractiveness of public spaces would reflect as 0.687-unit increase in satisfaction of tourists. In the second model which includes attractiveness of public spaces and prices of F&Bs, one-unit increase in factors leads 0.467 and 0.439-unit increase in satisfaction, respectively.

Intension for “Recommendation” is closely related with presence of “historic places”. The tourists recommend Al Quds to others mainly for the abundance of historical sites. This finding has two interpretations. First one is that Al Quds is in a very advantageous position in terms of presence of various unique historical places and the other one is there is no other attraction in Al Quds that visitors can recommend to friends and relatives. It is obvious that, historical attractions should be accompanied with qualified and diversified services and products in order to improve tourism business in the city.

The regression analysis indicates that there is no specific parameter affecting the “Intension of Revisit”. As stated above, the visitors recommend the destination to their friends and relatives because of historical places, once they visit and see those historic and religious places, other attractions, products or service quality are insufficient for attracting tourists to visit there again.

It should be reiterated that these findings should be regarded as preliminary and should be examined again with a larger sample if more reliable inferences need to be made.

5.2. Opinions of Tourism Stakeholders

In order to determine the views about Al Quds in particular and Palestine in general from the perspective of tourism professionals, two groups of interviews were conducted with (i) international tour operators out of Palestine and Al Quds and (ii) local actors such as international tour operators based in Al Quds, owners or managers of tourism businesses in the city like souvenirs shops, restaurants and hotels, representatives of private sector NGOs, Palestine Ministry of Tourism and Antiquities, and universities. These two groups of tourism stakeholders were interviewed face to face through online tools and their insights and foresights were taken by asking some open-ended questions about their operations, present situation, difficulties, expectations and recommendations towards tourism sector. Opinions of both International Tour Operators and Local Stakeholders are grouped under three main categories; (i) General Statements (as present situation) they observe or experience directly in the field, (ii) Needs and Problematic Areas of tourism sector in Al Quds and Palestine related to Infrastructure, Service Quality, Promotion and Marketing, Economic and Financial Needs (from domestic stakeholders) and (iii) Advantages of Al Quds and Palestine from the perspective of tourism business. Findings obtained from the interviews are given below.

5.2.1. Opinions of International Tour Operators

5.2.1.1. General Statements

General observations and the insights of international tour operators are given in the following paragraphs.

International tour operators identified the profiles of the tourists for whom they serve as generally well – educated (higher education graduates), in the age group of above 40, retired from public institutions or emeritus lecturers (professors), teachers or bureaucrats. Tourists with this profile generally come to East Jerusalem for pilgrimage and with cultural motivations. Religious and cultural motivations are also overwhelmingly prominent among tourists' purposes of visits to East Jerusalem independent of their profiles. Apart from religious and cultural aims, some tourists may come to East Jerusalem for leisure and health in limited numbers. Since the great majority of the tourists visiting East Jerusalem concentrate on their missions as pilgrims or intend to learn about their cultural roots during their visits in some of the most sacred sites for their beliefs, they often have no big expectations in terms of comfort and generally express their high satisfaction and nearly no complaints are received regarding their trips and experiences.

Tourists coming to East Jerusalem for cultural and pilgrimage purposes generally act together with a group composed of their family members or close friends. Typically, these groups leave their hotels early in the morning after having breakfast at the hotel. They walk through the holy lands all day with an accompanying tour guide. They mostly have snacks as lunch. In the evening, they get tired, return and have dinner at their hotels and go to sleep. Free independent travelers (FIT) rather than group tourists generally want to go out in the evenings after their visits to holy sites, and taste some different cuisine, meals and drinks. In this respect, East Jerusalem is weak in providing such opportunities in the evening. Hence, it has turned out to be a necessity to offer activities to tourists in the evening and at night because individual visitors may prefer to go to West Jerusalem even if they accommodate in the East. In this respect, quantity and service quality of F&B facilities should be at a desired level in East Jerusalem.

International tourists coming to East Jerusalem are composed of Christian visitors in greater number compared to Muslims. Christian tourists /pilgrims are interested in and want to learn the cultural aspects and roots of their religion in Al Quds without considering any sects in Christianity. Even though Christian visitors bear no negative opinions towards Palestinians they return back to their countries with the perception that East Jerusalem is not in a very good condition compared to West.

International tour operators from Turkey state that they already work in great majority with Palestinian – owned tourism businesses from accommodation and transport to F&B facilities and they also work with Jewish-owned facilities to a lesser degree. European – based tour operators, on the other hand, state that they do not have any preference between the tourism businesses belonging to Palestinians or Jewish and they can also work with Palestinian businesses as long as they give the same quality services as Jewish ones.

It can be a statement that satisfaction rate is high among majority of tourists coming to East Jerusalem, their priority and expectation is not a highly comfortable and luxury accommodation, on the contrary, more local and oriental ambience. Individual visitors or young tourists sometimes demand night activities at least eating or drinking elsewhere out of their hotels. Neither tourists nor tour operators have any prejudices towards Palestinians and they find them to be friendly and welcoming.

5.2.1.2. Needs and Problematic Areas

The interviewed international tour operators identified three groups of needs and problematic areas in the tourism sector in Al Quds; infrastructure, service quality and promotion and marketing. Their views on these three areas are detailed below.

5.2.1.2.1. Infrastructure

Even though there is a high demand for accommodation facilities in especially high seasons, since the physical conditions of some facilities are not so good they are preferred less by some tour operators. Such buildings located mainly in the Old City and they are in need of renovation and maintenance but due to Israeli Government's practices, owners of these buildings cannot renovate them because of legal difficulties and the lack of financial supports.

Due to intensive use of holy sites and places of cultural heritage in East Jerusalem, sometimes commonly used facilities like restrooms may be dirty. In addition, for the same reason, inside the buildings or yards of the visiting points are sometimes get crowded. This congestion in the sites gets more intense when Israeli military forces close the gates and roads without any reason. Such a situation causes long waiting time and complaints of visitors since the visitors have limited time to visit a place they already paid for.

Apart from the religious sites, streets of the city in East Jerusalem are not at the desired cleanliness level. In addition, aesthetic and order of the city sometimes got deteriorated due to haphazard littering from shops. Bad smell of garbage on the streets left by inconsiderate people or shop owners is quite frequent. Such unfavorable circumstances have negative impact on the image and perception of the city. There is a need to increase awareness among people and shop owners/keepers for keeping the streets clean for more tourism and better city image and city identity.

In the Old City, streets are usually dark and create an unsafe image for visitors even though they are very safe. There is a need to increase the lighting level or illuminate some parts at night especially in the Old City.

5.2.1.2.2. Service Quality

Palestinians suffer from lack of foreign language skills. This situation is also prevalent among tourism workers in East Jerusalem. Foreign language is a prerequisite to increase tourist satisfaction, service quality and revenues. Therefore, there is an urgent need to learn foreign language(s) for people working in the subsectors in tourism value chain.

Apart from foreign language skills, the number of people who have been trained as tourism employees from housekeeper to front desk and tour guides to even directors at a tourism facility needs to be increased. Due to long periods of crises caused by political conflicts and wars, tourism sector in East Jerusalem has been adversely impacted. After every crisis, some of the tourism businesses cease their operations and leave the sector dismissing their employers trained and experienced in tourism. These valuable human resources start to work in other sectors, which are not relevant to tourism. This is a very serious loss for the sector and the economy. Therefore, in order to train young population in tourism and offer them employment and career opportunities in the sector in a bottom – up approach, establishment of vocational high schools can be a solution. In this way, a sustainable human resources planning may be in place for the sector by delivering education and training to bring up skillful tourism staff in East Jerusalem.

Tour guides are very important actors of the tourism sector in East Jerusalem because of the scale and variety of cultural heritage and religious assets located over a small area. The details and narratives about these assets cannot be understood and learned without an experienced tour guide. A talented and knowledgeable tour guide increases tourist satisfaction and minimizes complaints as (s)he plays an important role in preparing groups, managing crises and smoothing out unexpected flaws. Therefore, the number of well-qualified tour guides who have proficiency in language(s), who know and are able to tell the true narratives about the roots of each religion needs to be increased.

Pass points and check points are very strict and visitors are generally bored and get upset during unordinary security controls performed by Israeli security staff who exhibits aggressive behavior in the entrance and exit points of religious sites such as Al Aqsa. At Israeli borders including the airport, tourists have to wait too long and are exposed to very strict security control procedures. This is also valid for the travelers arriving from Jordan through the highway. Israeli Government has to ease their strict measures for some touristic sights. Lack of international recognition of Palestine Government causes serious problems for tourism because visitors have to get Israeli visa to reach East Jerusalem. Legal procedures (of Israel) especially visa operations should absolutely become more flexible, as in general tourist visas are issued in the last minute and causes a stressful preparation period for travelers. Sometimes they may not be ready on time and cause cancellation or delays in tours and result in economic losses for tour operators.

In addition to renovation needs of hotels in East Jerusalem, there is also need for professional management for hotels to deliver high quality services by considering cleanliness and hygiene, hotel staff speaking foreign language(s), conscious and trained staff including drivers of tour buses who stick to their commitments to tour operators. Some tour operators find hotel prices to be higher compared to the prices of those established in the surrounding areas and even in Europe due to the results of Israeli policies.

Generally, tourists buy religious artifacts and souvenirs representing some religious figures and motives. There is a need for shops selling all types of touristic items and those should be certificated in order to ensure the quality and trust.

Even though the quality and physical condition of tour buses hired are good, there is a need to train and even certificate the drivers.

5.2.1.2.3. Promotion and Marketing

At the very beginning of the promotional activities, there is a strong need to correct the false image of insecurity of the city in people's mind. It is very problematic that although there is no war in Al Quds, there is a negative perception about the city as if there was. Media sometimes cause negative images by exacerbating the situations.

Great care and attention should be paid for the promotion of the city by emphasizing its peaceful characteristics sheltering the members of all Abrahamic religions. There is a need to increase awareness and beliefs among Palestinians in East Jerusalem about the benefits of tourism. It is necessary for locals to be open to innovation and changes to get higher benefits.

5.2.1.3. *Advantages*

Al Quds is a very preferred and enjoyed destination for European people. Nearly none of tour operators organizing tours to East Jerusalem discriminate their local partners based on ethnicity or religion. Their priority is the provision of the best quality services. Whoever offers better quality services by improving their facilities and businesses, these operators are open to work with those. In addition, no negativity or prejudice exists among the international tour operators bringing tourists to Holy Lands towards Palestinians to work except for their criterion of service quality.

Both tourists and tour operators find Palestinian people friendly and easy-going. In spite of Israel's promotion for having a European image, European tourists desire not to be in the sites looking just like those in their homeland. They demand and want to see more oriental/Asian ambience, experience more local atmosphere, reach local products and expect to buy some local stuff from local tradesmen in local bazaars just like in East Jerusalem. Tourists enjoy the Palestinian food / cuisine in East Jerusalem.

Visitors coming to Israeli cities like Tel Aviv or others for various purposes such as conference, can also visit East Jerusalem since the city harbors numerous tourist attractions. Such tours can sometimes arrange accommodation and stay in East Jerusalem.

Interviewed tour operators report their clients' positive opinions on; East Jerusalem as one of the culturally and religiously – richest places in the world for Muslims, Christians and Jews having huge and rich cultural heritage and divinely and highly holy atmosphere.

Even though their number and capacity are not sufficient in especially high seasons, East Jerusalem owns a number of very good and high quality hotels. Turkish visitors are reported to feel themselves like in Istanbul while they walk through in Al Quds because of the similarity of its bazaars, ambience and goods offered.

Satisfaction levels of nearly all visitor types are reported to be very high in general. There are even cases like some loyal clients who have been to Al Quds for the fourth or more times. Almost the only subject of complaint coming from some elderly visitors is the distance of their accommodation facilities to the religious points such as Al Aqsa and others.

Palestinian cuisine has vast diversity and people are hospitable and generous in sharing their food. Gastronomic values can be served in a tour package as a tourism product where locals and visitors cook and eat local dishes together.

5.2.2. Opinions of Local Stakeholders

Opinions of local stakeholders are also categorized under the same headings as (i) General Statements, (ii) Needs and Problematic Areas including Infrastructure, Service Quality, Promotion and Marketing and Economic and Financial Needs (additional) and (ii) Advantages of Al Quds and Palestine for tourism. The findings based on the interviews are summarized below.

5.2.2.1. General Statements

General observations and assessment of the local stakeholders are given in the following paragraphs.

Tourism is based almost totally on pilgrimage in Al Quds. Until recent years, great majority of pilgrims were Christians. But for the last three to four years the number of Muslim visitors has also increased.

There is a big demand from tourists for East Jerusalem but the city cannot fulfil the demands in the respect of accommodation facilities. Since 1967, Israel has allowed building of only one hotel in East Jerusalem. From that time, the buildings used to be hotels in the old days have been converted to be used for different purposes like offices. Due to the strict policies of Israel, the number of hotels and rooms has been decreasing dramatically since the date mentioned above. Therefore, the capacity of hotels in East Jerusalem may sometimes not be enough to meet the demand.

Tourists sometimes prefer not to stay in East Jerusalem and go to Bethlehem, Jericho and West Jerusalem for entertainment and night activities. Competition among tourism businesses is high in East Jerusalem even higher than those with Israeli businesses.

To the political aspect, main challenge for East Jerusalem is that the city is under the occupation of Israel and as a country Palestine does not have any political / national borders under its

control. All the people and tourists are subject to Israel's control. In East Jerusalem, businesses belonging to Palestinians are also registered legally in the Israeli system. Therefore, they have to comply with certain legislation with certain measures and criteria that Israeli Ministry of Tourism applies to whole tourism sector such as insurance, operational standards, visiting sites, number of people on the buses and hotels some of which are useful. In addition, tax policy of Israel is not fair because Palestinian tourism businesses pay taxes but receive nearly no services. Tourism statistics is also registered by Israeli authorities and their statistics seems to be more realistic.

Visitors and pilgrims face some problems at cultural and religious sites. These sites and buildings are located in the Old City. From time to time, these areas get crowded with visitors and congestions of people are witnessed during the trips. When tourists / pilgrims come to visit these buildings and sites they have to stand in a queue and wait for a long time to go in. In addition, Muslim pilgrims are exposed to strict and annoying security measures of Israeli security forces at the door of Al Aqsa, for example, there is nothing anyone can do when the security staff closes the door and does not allow any tourists without any reason. Such practices reduce the satisfaction level of tourists and harm the image of Al Quds.

As a destination, East Jerusalem already hosts a high portion of Christian pilgrims/visitors. In addition, during the dead season for Christian tourism, the high season starts for Muslim tourists. Palestinians do not have any power in East Jerusalem to manage the visiting sites because the authority is Israeli Government. However, it is the Palestinians who know the situation, needs and what happens in the religious and cultural sites.

Apart from international grants, Israeli banks do give loans to Palestinian tourism professionals but in very limited amounts. In contrast, Israeli businesses can access larger amount of loans very easily. Local private sector NGOs can get money from international funds like UN and the EU. There are examples where such local NGOs found international partners and received supports from foreign funds like GIZ (The Deutsche Gesellschaft für Internationale Zusammenarbeit) and others (like British, Turkish and Dutch agencies).

Based on the political instabilities in the past and the present and also because of the Intifadas, wars and conflicts over years, tourism professionals, including tour operators and hotels and even experienced and trained tourism employees working in tourism value chain left the sector. They found jobs in other sectors not related to tourism. Therefore, service quality has always gone up and down. As the quantity and qualification of staff change, service quality also changes.

Tourists who have been to East Jerusalem before do not have any complaints about their trips since they are aware of the conditions of hotels and service quality levels, i.e., their expectations are not very high. However, young tourists and those coming for the first time to the city may have some complaints since their expectations may sometimes be different from what they actually experience.

Practically East Jerusalem is separated from Palestine and therefore local and domestic tourism with the rest of the country is not possible. Palestinian Ministry of Tourism and Antiquities investments in promotion to change the tourism image Israel tries to constitute which ignores the existence of Palestine and other religions. Palestine is not mentioned in the international holy land tour packages.

Tourism trends are always changing and so are the situations and attitudes of the actors in the sector e.g., concentration on training the employees, use of social media and higher technologies for promotion. Tourism may be a good channel for local community to tell visitors unjust situation and injustices.

In spite of being a temporary situation, COVID-19 pandemics has impacted the sector representatives in East Jerusalem so unfavorably that after the pandemics it is feared that some tourism businesses will not continue their businesses and leave the sector. As it happened before, they may close their hotels and turn their buildings into offices.

5.2.2.2. Needs /Problematic Areas

Needs and problems are categorized into four groups different than those of international tour operators as Infrastructure, Service Quality, Promotion and Marketing and Economic and Financial Needs. The findings from the interviews are given below.

5.2.2.2.1. Product/Market Diversification

The number of Muslim tourists needs to be increased since there is a huge potential for it and this number is lower compared to that of Christians. In order to double or triple the number of Muslim tourists it has become a requirement to launch a trail (Muslim trail), like trail of old Russian way, normal pilgrimage trails of Christians and Muslims and on the other side, the Jewish trail promoted by Israel. There is an urgent need to build / open new hotels to meet the accommodation demand in East Jerusalem especially when the demand of Muslim tourism increases.

If some trails, visiting trips and programs are to be planned and implemented by developing right itineraries, then the Israeli identity, which is promoted to overshadow all identities, will not be seen as the only identity, and other identities will become visible. In order to regain, attract or make young people coming together with their elderlies after especially pandemics stay longer, activities additional to pilgrimage tours (trails) can be organized. The suggestion of "Pilgrimage +" can include one or more activities in addition to pilgrimage packages i.e. for the youth, programs may include adventures, culinary activities, beach, wine tasting, bird watching, hiking and even 4 – and 5– star hotels can be utilized for entertainment as well as pilgrimage.

Physical infrastructure investments are needed in East Jerusalem to renovate or re-build the deteriorated buildings or sections, but this is generally not possible because of limited financial resources. The cost of constructing or renovating a building (hotel) in East Jerusalem is higher compared to other parts of Palestine because each cost item from labor cost to rent is higher.

There is also need for boutique hotels since the present ones cannot meet the demand for accommodation. Current buildings may be converted into hotels.

In East Jerusalem, street lighting is not sufficient, and most of the shops, restaurants and cafes are not open after sunset. Most of the religious and cultural sites like Al Aqsa are closed after 6 PM. Going out for shopping in the evening is not an option for tourists because everywhere is closed. There is also need to support cultural events such as improvement of infrastructure for the location and financing travel costs for musicians and artists.

Credits or grants from international resources can be used for the improvement and conversion of some cultural and historical places to tourism. Diversity of the culture, religions, architecture and other values makes the identity of Jerusalem unique. Architecture of the buildings, services given at hotels and also souvenirs sold in the shops should reflect the unique characteristics of local culture and identity of East Jerusalem. Souvenirs should be manufactured in local workshops and high quality restaurants should be opened.

There is a need to produce souvenirs in local workshops and the same need is also valid for high quality restaurants. Earlier, tourism was seen to be only an economic activity but now people are more aware that there is more to it. Trend has shifted in favor of local communities. In this respect, in Palestine and East Jerusalem many small villages and even refugee camps host tourists to show their uniqueness.

5.2.2.2.2. Promotion/Marketing

It is difficult to have a website as a business in East Jerusalem since it is not easy to get the required license from Israeli government.

Academic studies and research need to be supported to develop true narratives for Palestine and Al Quds. Government support for marketing is very limited given the destination.

Tourism businesses do their own marketing. They visit their target markets where there is interest mostly as a pilgrimage destination for religious tours for Christian and Muslims. Tourism businesses have to do their own marketing without receiving any support for attending fairs or organizing roadshows. General expectation is that destination marketing should be performed by the public sector.

In East Jerusalem, branding is a problem because Israeli side promotes all the area as Israel by ignoring the existence of Palestinians trying to make a dominant perception on the minds of visitors.

Tourism private sector in East Jerusalem owned by Arabic population does not have sufficient financial resources to implement projects that will yield common benefits such as developing trails or tour packages: They rarely make joint efforts for marketing and promotion because individual businesses perceive each other as competitors. Therefore, there is still a need for a

very comprehensive umbrella organization for tourism actors in East Jerusalem to develop visiting trips, programs, trails, marketing, etc.

As far as promotion is concerned, it is a disadvantage that Israeli Ministry of Tourism spends millions of dollars every year to promote the area and they have 23 offices around the world and tourism representatives emphasizing the identity of “Jewish Jerusalem” for the area including East part of the city. They ignore the immense history of Muslims and Christians and their heritage which can be witnessed everywhere in Jerusalem. East Jerusalem tourism professionals cannot adopt such an aggressive promotion approach because they cannot afford the budget for travelling for promotion, operating offices and training guides. Individual businesses, especially tour operators, can only promote themselves in a very simple and economic way such as constructing web sites, printing catalogues, etc. using limited funds.

Promotion and marketing require professional approach for the organization of exhibitions, road shows and other small programs which all need financial resources. Therefore, businesses should also get support for their promotional activities. The more the promotion is done the better for tourism sector.

Not only Israeli companies but also ones from Jordan and Egypt are important competitors. There is fierce competition between companies from these countries, but East Jerusalem and Palestine do not have equal opportunities with the others.

In order to support the ongoing promotion activities and further promote East Jerusalem, world famous bloggers, actors, musicians, celebrities and chefs should be encouraged to visit East Jerusalem and make performance together with their local counterparts, make the city visible in social media, stay at a hotel, attend a concert, talk to local people, hear their stories. There is a need for a dynamic and updated digital platform as a key to promotion, marketing and selling. Such a platform should offer multilingual interface, give detailed and updated information about history, hotels, restaurants, what to do in Jerusalem. It should have a street map, should provide information on activities, events, distances to certain locations, etc. It should be a mobile application with social media link. Each stakeholder of the platform should be able to update their information and information about the events.

There is a need to further improve the notion of “cooperation culture” among Palestinian tourism businesses in East Jerusalem. A common system for reservation, promotion and other services is necessary for the businesses.

Since East Jerusalem is separated from Palestine and the rest of the world, there is a need to develop online services to open up to the world by considering it as an open market. Identity of East Jerusalem needs to be linked with other Palestinian cities and a Jerusalem identity must be built on the integration of the city with its surroundings and it should not be separated from Islamic and Christian world and the rest of Palestine.

Promotion campaigns and projects should be developed and implemented together with all sides, including Ministry of Tourism and Antiquities and private sector associations in order to construct a special brand of Al Quds.

Israeli authorities put Palestine and East Jerusalem at a place with one sided approach. But both the city and the country need to take position according to their own reality by advocating their existence, values, richness and unique identity in international arena by joining under one umbrella as all sides of tourism. There is a need to open new tourism offices to promote the country.

5.2.2.2.3. Economic / Financial Needs

In East Jerusalem, capital is very limited and there is nearly no local or foreign investor with enough money to build a hotel. Due to legal regulations of Israel, it is impossible to finance building new hotels. Local investors and entrepreneurs can only invest in tourism if they manage to get legal permission.

It is hard for a business to cope with the financial problems in East Jerusalem due to high and unfair taxes to be paid to Israeli government for virtually nothing for return. Moreover, services are more expensive in East Jerusalem since the cost of land, rent, electricity and water is higher compared to Palestinian cities.

The tour operators and most of the tourism businesses do not get financial support from international funds. Tourism businesses in East Jerusalem are under the rules of Israel and it is not possible for them to benefit from the supports of Ministry of Tourism and Antiquities because Israel denies the governance rights of the Palestinian Authorities in Al Quds.

Most of the tourism businesses in East Jerusalem are small scale family businesses, not big corporations or shareholder companies. It is difficult for tourism businesses to know and follow the legal framework of Israel in East Jerusalem especially for taxes, therefore they need consulting services from legal advisers.

Tourism businesses in East Jerusalem have limited resources for using new technologies as well. New tourism entrepreneurship programs for women and youth should be initiated. Costs, especially labor costs, are higher in East Jerusalem compared to other Palestinian cities because of the minimum wage imposed by the Israeli government. Rent, land and taxes are also higher and therefore the cost of accommodation and other services are usually higher in East Jerusalem compared to other Palestinian cities.

Palestinians pay the same taxes with Israeli businesses but they do not receive the same services. There is difficulty even in uploading and downloading goods, embarking and disembarking tourists from buses or trucks due to lack of parking area. Palestinian businesses are not subject to Palestinian legislation and even though they are formally subject to Israeli legislation, and they do not benefit from tax and loan advantages and municipality services.

Businesses experience difficulties in taking loans from Israeli banks because they do not recognize the land in East Jerusalem as collateral. Buildings are old and must be renovated but because of the limited financial resources, owners cannot renovate them.

It is vitally important to benefit from Palestinian diaspora as tourist and investors. Hotel investment is needed urgently even though there are legal and political barriers introduced by the Israeli government. Even though it is very difficult to access financial resources and make investments in East Jerusalem, there is a problem of keeping the existing capital in the city as well. Because of higher expenses (e.g., labor, rent, tax etc.) investors and also local business owners consider moving their businesses or making new investments in more advantageous areas.

Donor supports should be utilized to create long term impacts rather than implementing yearly projects. There is a need for coordinating donor supports together with local partners in strategic areas. There is also need for improving collaboration among associations and other stakeholders. Individual supports can be delivered to family business and families must be encouraged to engage with tourism business even for providing accommodation services as it is in all over the world.

Political situations interfere with the way of doing business for tourism in East Jerusalem and in all Palestine. Jewish tour operators and guides try to take control of everything about tourism and they do not allow their customers to visit Palestinian's shops. Tourism has a potential to contribute to Palestinian economy, but behavior of Jews limits this potential. Old City tours can last longer than one day but Israeli tourism professionals limit this tour to only half a day and do not allow tourists to spend extra time in the area.

When tour groups come to Old Town they do not visit souvenir shops belonging to Palestinians but rather to those owned by Jews with whom operators allied previously. Only individual tourists visit Palestinians' shops. Tour packages should be redesigned to have higher added value and long term strategies should be developed to have higher value added and competitiveness by concentrating on unique points and market niches. Scale of economy should be broader in East Jerusalem because of its potential. Capacities of all tourism facilities should be increased to meet the demand. Hotels with higher number of rooms should be built or opened to reach the numbers before 1967 again.

If people can legally apply to grants for getting finance, they can invest in different areas in tourism. Present and future legal status of the city should absolutely be clarified and investors should be attracted. Concrete projects need to be implemented by concentrating on the underdeveloped Palestinian sections of the city. Al Aqsa and its close proximity should be developed for tourism by considering the poor population there and their share from tourism revenues should be increased by including them in the sector.

5.2.2.2.4. Service Quality

Pilgrims of each religion should feel themselves as part of the trail they walk through. Therefore, guides should tell the true story of the sites and show trails for Christians, Muslims and Jews. Currently, if demanded, Muslim or Christian guides can be employed for the pilgrims in East Jerusalem. Jewish operators also use Christian and Muslim guides to get in the market. In order to increase the qualification of tourism employees (from waiter to house keeper, driver, guide and even marketing staff) and increase service quality, there is a need to have serious hospitality schools, in addition to Bethlehem University, and training centers to train currently employed staff in East Jerusalem.

For the increased qualification of tourism employees, private sector cannot spend money on training and there is also need for support to train workers at all levels from directors to drivers. Even though the Palestinian people have positive attitude towards tourists, for the employees in the sector the attitude should be improved from a professional perspective (e.g., waiters can smile while serving and others behave more professional and service oriented manner as in other countries).

Quality of tours is affected by the reality of stories tour guides convey. For instance, Israeli guides tell history and stories from the perspective of Jews and sometimes even Muslim guides may do such a thing. Therefore, the tour guides need training to know and tell the true stories about the area. Tour guides in East Jerusalem are licensed by Israeli authorities. This does not prevent them to receive refreshment training / courses from other bodies such as NGOs. Current tour guides can be given refreshment courses with some financial support and they are taught to tell true stories of the areas not only from the Israeli perspective but also through the perspectives of Muslims and Christians.

Tourists / visitors coming to East Jerusalem visit historical, cultural and religious places during the day and then return to their hotels, have shower and go to bed if they are in a group. However, FIT tourists come alone and travel by themselves and after returning their hotels they want to go out in the evening/at night. However, they find nearly no activities to attend or a place to enjoy the night. Musical activities are vitally important to attract tourists and meet this need. Through musical activities tourists can learn local folklores and Palestinian culture better.

While visiting historical and cultural sites tourists want to learn local culture and listen to local music. Sufi music in mosque and Christmas concerts in churches can be ideal musical activities in special times like Ramadan and other holy days. In addition, local music and culture can be introduced to visitors in businesses being part of the tourism value chain like shops, restaurants and hotels.

Street festivals like the one organized on Nablus Street involving food and music can be organized at regular intervals under different names in addition to the ones that are already being organized. Regular cultural activities should be organized by constructing and following a yearly schedule. These events can be introduced progressively starting with small weekly

events, and gradually including larger monthly national and international activities once in three months in East Jerusalem like exhibitions, concerts, mini festivals and street festivals. Among those could be events like Nablus Festival organized in May as a major festival, a big Palestinian Festival in June or July, Jasmine Festival in March or April, Arabian Nights Festival in November and Christmas Festival in December.

Currently, a festival is held in East Jerusalem involving exhibitions, street concerts, and exhibitions on local cuisine and heritage every three months. Some international donor organizations sometimes provide support to these festivals not in cash but by making arrangements for bringing musicians or bands to the festivals. In addition to festivals, performances can be organized with partner countries repeating the same performance in Palestine and in the partner country.

International education and friendship programs need to be developed for tourism employees especially guiding them to learn or improve foreign languages.

In parallel with the broad definition of tourism, the need is obvious in East Jerusalem to serve tourists the best food and entertainment alternatives in addition to the services related to heritage (cultural, religious). For this purpose, events and activities can be designed in a creative way including cooking homemade dishes with local women, music performances in restaurants, live exhibitions and performances on the streets, gardens of churches, mountains or on cultural sites. Production of souvenirs with visitors; local, traditional or popular sports activities or instant tourism events for a group (like recitals at hotels) can be arranged with local people in order for them to adopt tourism culture and get share from tourism receipts. New event organization enterprises may need to be established for such performances.

The duration of current touristic attractions (activities) in East Jerusalem is not long enough for some tourist groups. These groups can benefit more from cultural richness. Through different attractions and activities in religious / cultural sites tourists may prefer to stay longer and spend more time and money.

In addition to the statements above, tour guides need all kinds of support both financially and technically. They have to operate with Israeli license. They should improve their foreign language skills.

There should be more attractions, events and activities for tourists enabling them to benefit from the cultural and local richness of East Jerusalem. In this way, local products like food, oil etc. can be sold and local people can get higher benefits from tourism.

Tourism should not be considered as solely for pilgrimage in East Jerusalem and all actors in the tourism value chain must be taken into consideration in a holistic approach. Local people need to develop a sense of ownership for East Jerusalem and the tourism sector in order to have full benefit from it. If local people have their share in tourism revenues, they will show more interest in tourism. Competitiveness should not be based on price reduction but quality improvement.

Uniqueness of the destination, hospitality of people and a feeling of solidarity may convince people to come to Al Quds.

Benefits of tourism to local people have different aspects. As an important economic sector, tourism needs to be completed with narratives. In order to increase tourist satisfaction and decrease complaints tourists need to be oriented well and groups should be prepared for the challenges during the trip. In addition to offering one-fits-all tour packages, some alternative packages can be developed considering the background and expectations of the groups. Tourists should get in touch with local culture, cuisine, people and other cultural elements.

5.2.2.3. Advantages

People coming to Al Quds can find something to eat, buy souvenirs and do other things tourists may enjoy. Not only Al Quds but also Hebron and other religious areas are very attractive and satisfactory for tourists. Tourism is a channel of communication between Palestinians and the rest of the world and supports development of a national narrative based on research in history, archaeology and other fields.

It may be an advantage that in every season, there are tourists that visit and prefer to visit East Jerusalem even in times of war and conflicts. Local people and tourism professionals are used to operate in such extreme situations and can sustain their business.

People and tourism professionals have witnessed that tourism is profitable regardless of political tensions and people earned money in the last 30 – 40 years because East Jerusalem attracts tourists all year round. Tourism sector is profitable in East Jerusalem and Palestine. People can benefit from this sector. Some of the local tour operators have given services since 1960 in East Jerusalem and they are very experienced.

Since most of the tour operators and other businesses in East Jerusalem have been in business for a long time and on their own with no or very limited external support, they are very resilient to crises. The advantage of the businesses in East Jerusalem is that they all have learned how to survive on their own independent of any government, or any other support from NGOs or international donors.

Islamic tourism market has been increasing for nearly 10 years because of tourists coming from Indonesia, Malaysia, India and Turkey. The advantage of East Jerusalem is that hotels are very close to Al Aqsa and other cultural and holy places. That is why hotels have high occupancy rate even in dead season. Present tourism professionals in East Jerusalem have the advantage of knowing the need of the markets they work with since they have been in the market for a long time and adopted a service-oriented approach for tourism. Therefore, following the first visit, tourists are willing to work with Palestinian professionals forever.

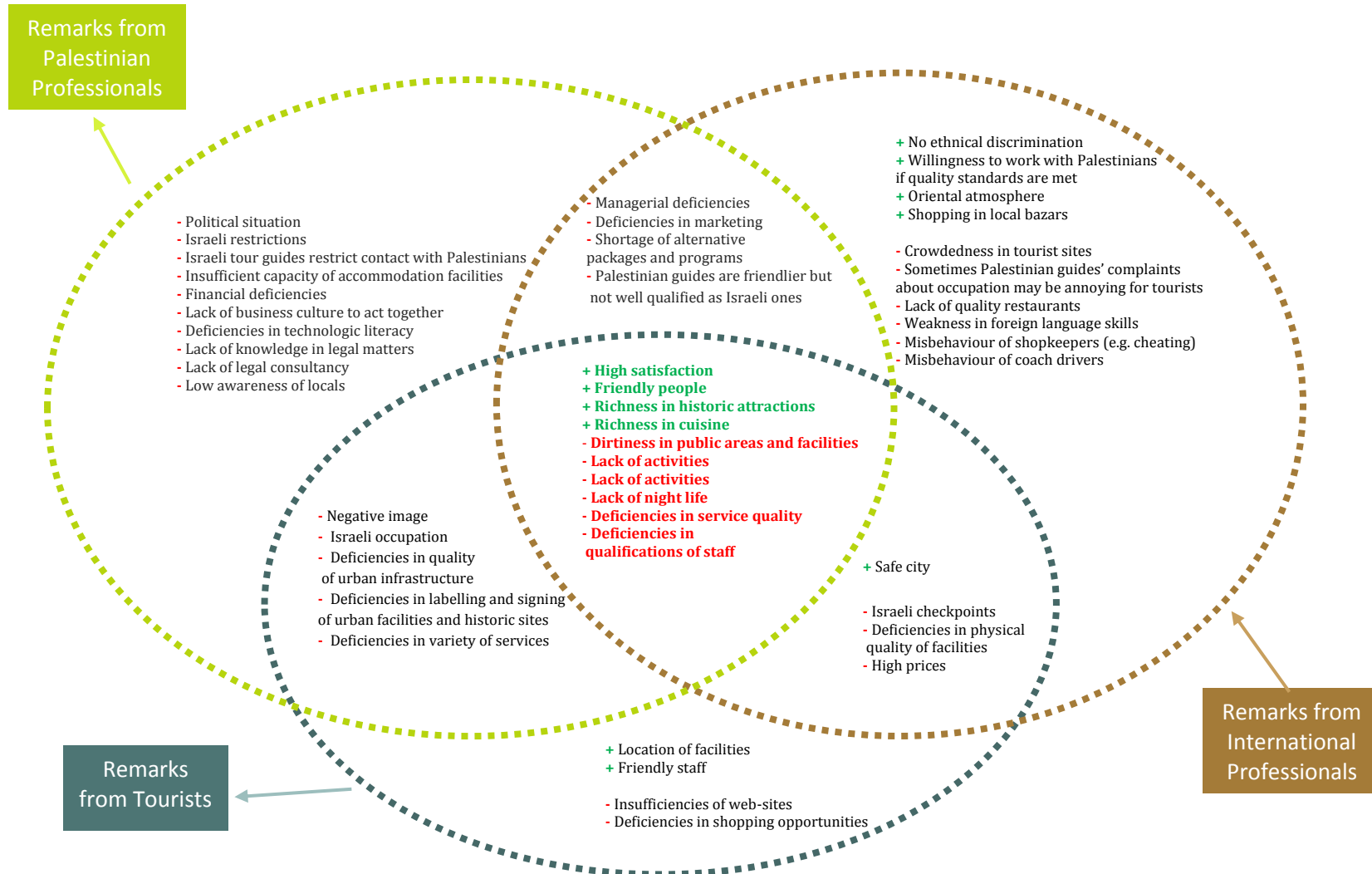
Almost all tourists and tour operators visiting and working in East Jerusalem give positive feedback about their local partners. Among the reasons of this satisfaction is that the clients are ready to buy all touristic itineraries in East Jerusalem and Palestine because of their importance

as well as hospitality of local partners and open-hearted Palestinian people and the very diverse landscape that can be found in a small area. East Jerusalem is in fact the cultural capital of Palestinians and every year several cultural festivals are held in the city.

The basic views and common points of all three groups are given in Figure 28 below and the findings of the analysis and interviews indicate that tourists, international and Palestinian tourism professionals generally underline common advantages and problems, and different opinions are observed only on some details. While the historical, religious and cultural richness of Al Quds stand out as strengths and advantages; in addition to the current political conditions, and partially caused by them; the lack of service diversity and low quality also stand out as weaknesses and risks. In this context, taking into account that tourists are generally satisfied with their visit to Al Quds; developing programs and delivering supports to enterprises to overcome their financial problems, and increasing the managerial skills, physical conditions (especially of accommodation facilities), supply capacities, and service quality and variety of tourism products, appear to be principal measures to increase the socio-economic contributions of tourism.

Moreover, it is important to increase the technical capacities of employees in tourism sector in order to provide better urban services, and to offer activities and/or services that tourists can enjoy/participate in, especially after sunset. In addition to the fact that Al Quds businesses do not have a very strong corporate structure and financial resources, addressing these needs require a holistic approach and cooperation among actors. Therefore, it is clear that there is a need for an umbrella organization to mobilize and to coordinate the efforts. Hence, establishment of a destination management organization is a principal concern to ensure sustainable tourism development in Al Quds.

Figure 28 Remarks from Tourists and Palestinian and International Tourism Partners



5.3. Environmental Analysis: SWOT and PEST Analyzes and TOWS Matrix

Environmental analysis is a strategic tool identifying different external and internal elements influencing a tourism destination performance. For this strategic approach, an analysis of the levels of threats and opportunities of different factors as well as the priorities are established. SWOT and PEST analyses are used for understanding the tourism environment of Al Quds.

SWOT analysis, used in planning studies frequently, is a very functional method to reflect the information about an area as a whole and to assess the whole picture. The SWOT analysis (Strengths, Weaknesses, Opportunities and Threats), examines internal and external factors. While SW focuses on the advantages and disadvantages that the area/subject itself has, OT expresses the factors affecting the area/subject occurring out of the area. In other words, "O" and "T" refer to the factors that the area can not interfere but is affected, while the factors determined in SW are controllable.

PEST analysis, on the other hand, is a tool used for describing the changes and effects of the external environment on competitive position and examines four categories of external environmental factors as:

- Political factors including public interventions in various levels (such as tax policy, public stability and security, external relations, lobbying activities, etc.)
- Economic factors which cover local, regional, national and international macro-economic conditions (GDP, employment, inflation etc.).
- Social factors enveloping all social, cultural and demographic factors (demographic trends, living standards, education, consumer tastes etc.).
- Technological factors such as technological infrastructure, technology incentives and technological developments etc.

As in the SWOT analysis, the external environment consists of variables beyond the control of a destination, but it is useful to consider it together with internal factors to build the strategies. In this context, the combination of SWOT and PEST analysis can produce more meaningful results. For this reason, in the following sections, the description follows the order of SWOT and internal and external factors are presented from PEST perspective resulting in a combined SWOT/PEST table.

The TOWS matrix aims to develop strategies, based on SWOT analysis. In TOWS matrix;

- O-S section underlines the strategies benefiting from the opportunities to increase strengths
- O-W section remarks the strategies utilizing the opportunities to reduce weaknesses
- T-S section highlights how to use the strengths to reduce the threats
- T-W section emphasizes the strategies to alleviate both weaknesses and threats.

5.3.1. Strengths

5.3.1.1. Political Issues

Palestine is known worldwide as the "Holy Land" and has a "unique" appeal for three major religions, and occupies a central point for all three monotheistic religions. Beyond its importance for the Christians arising from having places related to the life of Jesus Christ, Palestine is also very important for Muslims. It has Al Aqsa Mosque, which it is the first Qibla of Muslims and is the starting point of Prophet Muhammad ascension. On the other hand, due to its religious and cultural structure, Palestine has an advantage for "Halal tourism", which is becoming increasingly important for the world tourism market.

The cultural and religious heritage and ancient historical sites of Al Quds make them unique global tourism destinations. Besides, "The Old City and Walls of Al Quds" are listed in UNESCO World Heritage List, Palestine, with its 1 approved and 13 nominated sites, has the most intense cultural heritage amongst neighboring countries with a density of 6 km² per 1000 km².

5.3.1.2. Economic Issues

The attractions are close to each other, they are easily accessible and transportation opportunities are diversified and qualified. Moreover, Al Quds is also close to other attractive sites such as Bethlehem and Jericho. Thus, partnership/cooperation opportunities can be developed with tourism businesses in other cities, as well as preparing alternative itineraries and routes for tourists such as nature trails and walking tours. The accommodation facilities and other services are located very close to Old City and other tourist attractions of Al Quds¹⁸⁷. The prices of services are lower in Palestine than those in Israel and this creates an advantage to attract tourists.

5.3.1.3. Social Issues

Since hospitality is part of the Palestinian culture, tourists are welcomed. Young population of Al Quds is multilingual and is very friendly to foreigners. This young generation with high literacy but (unfortunately) low employment can contribute to economic development provided that right business and investment environment is established.¹⁸⁸ The main elements of Palestinian identity include local culture and traditional crafts such as pottery, knitting, olive oil soap, wooden sculptures, and glassworks. On the other hand, the presence of talented craftsmen also allows these traditional arts to be performed in a contemporary and innovative manner and to contribute to the demand for tourism¹⁸⁹. Another strong cultural asset is rich cuisine including (not only) the lamb and chicken meat (both cooked and grilled), and mezes, salads, and desserts. Moreover, since the crime rate is very low on the Palestinian side of the city, tourists can travel safely.

¹⁸⁷ Jafari and Abdullah, 2019.

¹⁸⁸ Al-Rimmawi and Butcher, 2015, 317 – 335.

¹⁸⁹ Ibid, 317 – 335.

5.3.2. Weaknesses

5.3.2.1. Political Issues

Beyond the strengths mentioned above, Palestine and especially the tourism sector in Al Quds has many weaknesses arising from the current political situation on the ground and affecting not only tourism but also whole life and related sectors. The fact that the Palestinian state does not have full sovereignty and cannot control its borders would be the main weakness (although it is difficult and not fair to define it as a weakness). Therefore, tourism in Palestine and particularly Al Quds is de-facto dependent on Israeli policies.

The lack of cooperation, at both the intra-sectoral and inter-sectoral level, within the private sector itself, as well as between the public and private sectors, undermines competitiveness and market share¹⁹⁰. For example, there is no effective coordination between the representatives of tourism sector and religious and cultural NGOs. In this context, travel agencies manage most of the tourism activities themselves due to the insufficiency of other players in the value chain¹⁹¹.

Moreover, the existing institutional capacities are weak and therefore data and information about the sector and its needs are very limited¹⁹². For example, the data compiled by PCBS is not very dependable as it is obtained only from a limited sample and can only serve as an indication¹⁹³.

Poor legal framework and public support is another major weakness. The laws that govern tourism date back to 1965 and do not specify the responsibilities of stakeholders in the industry. Besides the protection of the touristic and archaeological sites; environment and local people are not taken into account¹⁹⁴. Beyond that, tourism is not a priority in terms of government policy. There is no public service sector policy, so there is a lack of campaign and media promotion as there is no specific marketing strategy. Furthermore, in public sources, cultural heritage is defined only as monumental value and rural lifestyle and neighborhoods are excluded. It leads to inefficient policies regarding tourism and cultural heritage¹⁹⁵.

Although Arab tourists have great potential for tourism sector in Palestine, there are very few of them visiting there mostly due to current political situation and Israeli occupation. The occupation restrictions and Israeli foreign relations with other countries determine which nationalities have access to visit Palestine. Another reason for Arabs refusing to visit Palestine is that they consider it as recognition of Israeli occupation and is a form of normalization. However, this potential should be addressed more effectively. Attracting tourists from Arab (and

¹⁹⁰ Jafari and Abdullah, 2019..

¹⁹¹ MoNE, 2014.

¹⁹² Friedrich Naumann Foundation for Freedom, 2013.

¹⁹³ SESRIC, n.d.

¹⁹⁴ COMCEC, 2019.

¹⁹⁵ Friedrich Naumann Foundation for Freedom, 2013.

other Muslim) countries promises a potential to protect the political and religious status of Al Quds and preserving its cultural heritage¹⁹⁶. Moreover, environmental problems such as littering, traffic congestion, pollution of water and urban and rural environment as well as excessive use of water resources seriously affects the landscape and cause biodiversity loss.

5.3.2.2. *Economic Issues*

Al Quds offers only religious and historical tourism; other types of tourism are few or none existent. For example, leisure, solidarity and nature tourism are not developed due to mismanagement¹⁹⁷. On the other hand, meetings, incentives, conferences and events (MICE) tourism have been underdeveloped due to reasons such as lack of experts, access difficulties and lack of plans. Occupancy rates are low due to high seasonality. Tourism in Al Quds has two peak seasons; the Easter holidays between March and April; and between September and October (as a result of high occupancy rates in West Jerusalem hotels in Jewish holidays)¹⁹⁸.

Israeli companies dominate the tourism sector and the tourism infrastructure is weak. Unfortunately, there is no effective mechanism for the protection of cultural heritage and archaeological sites. Therefore, infrastructure in many religious/historical regions is weak due to lack of public and private investment¹⁹⁹. For example, in many tourist attractions, there are difficulties stemming from the fact that religious organizations, responsible for the management of the area, have no say in the decision-making process on tourism and do not share their powers in other matters.

Most hotels, restaurants and tourist shops need modernization and physical restoration to upgrade their services and competitiveness, but they are mostly unable to do so, due to both financial difficulties and Israeli policies. Consequently, the competitiveness of the sector is weakened²⁰⁰ and caused tourists to stay short-lived in Al Quds²⁰¹. Moreover, the majority of lodging facilities have limited capacities and it is an obstacle to access to international markets and attracting large groups²⁰².

Another issue as weakness is lack of leisure activities in Al Quds. For example; Lonely Planet indicates that at night, entire West Bank has 1 entertainment facility and 0 (zero) tourism activity while Galilee (Israel) has 10 and 6 respectively. Entertainment activities would encourage tourists to spend more time and money²⁰³. On the other hand, the absence of nightlife in Al Quds and the closure of commercial businesses and shops early in the evening (around 8

¹⁹⁶ Jafari and Abdullah, 2019.

¹⁹⁷ MoNE, 2014.

¹⁹⁸ Ibid.

¹⁹⁹ Ibid.

²⁰⁰ Jafari and Abdullah, 2019.

²⁰¹ Fanack, 2020d.

²⁰² UN, 2014.

²⁰³ MoNE, 2014.

pm in the summer season and 6 pm in the winter season) discourage tourists from staying and shopping²⁰⁴. There is also a lack of supply of high-quality complementary products, especially local arts and crafts and cuisine²⁰⁵.

Despite some international cooperation, funding is minimal. For example, in 2013, UNDP implemented a USD 2.4 million project to preserve the cultural heritage of Al Quds and improve the socio-economic conditions by improving the housing and tourism services. UNDP also implemented a project with a budget of USD 34 million to improve public infrastructure and museums, water resources and cultural landscape²⁰⁶.

Without international aid, it is not easy to develop the current capacity and quality, because of difficulties in getting financial aid from Israeli government even though the business revenues are taxed by the Ministry of Finance. The revenues of Al Quds tourism is taxed by the Israeli government. On the other hand, the Palestinian tourism industry does not have financial resources to improve physical or service quality. The attractiveness of foreign direct investments (FDI) is also very low, mainly due to political situation.

The tourism sector is heavily dependent on imports to endure its activities²⁰⁷. Al-Rimmawi²⁰⁸ emphasizes that more than 9/10 of tourism revenue in Palestine is spent to import materials necessary to operate the services. A significant amount of raw material such as meat, vegetables and beverages are imported. In addition, hotels import a large number of goods such uniforms of workers or computer programs used for financial and managerial purposes.

The budget to promote tourism is relatively low compared to other countries as the industry needs²⁰⁹. Therefore, promotion of the destination in printed and visual media or on the internet is not at the desired level. There are even problems in participating international tourism fairs. Effectiveness of the Palestinian diplomacy is not advanced enough to support its tourism internationally. Investors have limited information about potential markets and therefore they are unable to position themselves and hesitant to introduce new products or revise existing ones to meet the needs of these markets.²¹⁰

5.3.2.3. Social Issues

The negative image with regard to security and accessibility prevents tourists from accepting Palestinian land as a safe destination. Tourists are discouraged to visit even safe locations since the entire Palestine is usually depicted as dangerous region in the mainstream media. The

²⁰⁴ Jafari and Abdullah, 2019.

²⁰⁵ Lin, Dosmukhambetov, Folkman, and Krishnan, 2013.

²⁰⁶ COMCEC, 2019.

²⁰⁷ MoNE, 2014.

²⁰⁸ Al-Rimmawi, 2003, 76-85.

²⁰⁹ Friedrich Naumann Foundation for Freedom, 2013.

²¹⁰ MoNE, 2014.

political conflict plays a major role in creating a negative image²¹¹. Therefore, there is a need to improve the perception of Palestine and Al Quds as safe with the help of the press²¹².

Although there are institutions providing tourism education, 50% of graduates go abroad to work annually²¹³. The majority of tourism employees are unskilled²¹⁴ and both the number of workers and skills needed are to be improved. Technical skills are limited and often insufficient; most importantly, management skills are minimal. Hospitality and language skills among employees often fall below international standards²¹⁵. When it comes to tourist guides, they need training specifically to speak the languages of the main market countries²¹⁶. They also need to get acquainted with the correct story and narratives of Al Quds against a large number of Israeli tourist guides promoting their ideology and politics²¹⁷.

There is a need to improve the management skills of entrepreneurs/business owners. Most Palestinian tourism businesses are family-owned, and managers generally do not agree or are unaware that their technical, marketing and especially management skills need to be improved. For example, accounting and auditing systems are old-fashioned and do not comply with the requirements of the Israeli tax and financial system. This prevents hotels and restaurants from benefiting some subsidies that are available²¹⁸.

On the other hand, Palestinians are not fully aware of the social and economic benefits of cultural heritage. Moreover, utilizing cultural heritage and developing tourism are not among their priorities²¹⁹.

5.3.2.4. Technical/Technological Issues

Although the internet and social media have great potential, they are benefited enough by neither public institutions nor private enterprises. By analyzing official websites of Arab countries, COMCEC²²⁰ states that the website of the Palestinian state is very weak and outdated in terms of content and design. The analysis shows that the Palestinian official web site is very weak in terms of image creation and sharing experience. Moreover, the site is not linked to social media and the user interface is not interactive. This results in deficiency in addressing foreign markets and causes lack of awareness overlooking richness of Palestine and Al Quds²²¹. Although there has been some development, MoTA's website

²¹¹ Isaac and Eid, 2019, 1499–1522.

²¹² UN, 2014.

²¹³ Friedrich Naumann Foundation for Freedom, 2013.

²¹⁴ Al-Rimmawi, 2003, 76-85.

²¹⁵ MoNE, 2014.

²¹⁶ SESRIC, n.d.

²¹⁷ Jafari and Abdullah, 2019.

²¹⁸ Ibid.

²¹⁹ Friedrich Naumann Foundation for Freedom, 2013.

²²⁰ COMCEC, 2015.

²²¹ MoNE, 2014.

(<http://www.travelpalestine.ps/en>) needs to be improved in terms of content and attractiveness. Although the site provides information about cultural assets, accommodation facilities, and has suggestions for itineraries, still there is no interactive content and social media connection.

On the other hand, although accommodation establishments have internet sites, they do (can) not sell over their websites. Moreover, very few Palestinian travel agencies have branches abroad or website to sell holiday packages²²². Tourism service providers in Al Quds could attract consumers with different travel motivations, and offer broader services if they provide their services online.

5.3.3. Opportunities

5.3.3.1. Political Issues

The recognition and awareness of Palestine as a state is getting international public opinion in an increasing manner. Therefore, it is crucial to be a member of international organizations as much as possible as Palestine, as a state, which would have positive impact on the improvement of Palestinian status in terms of both independence and tourism. Moreover, there are other positive developments such as, increase in the awareness about rights of Palestinians all around the world, international volunteer groups having more and intensified support and lobbying activities for Palestine. Therefore, it can be stated that international support for the Palestinian case has been recently increased. Consequently, the interest of the main stream media or alternative international media has been at higher levels. Since Al Quds is an indivisible part of Palestine, any improvement in the position of Palestine would have ripple effect on Al Quds.

Another opportunity is to establish strong relationships with international and regional tourism operators, especially in countries such as Central Asian countries, Russia and South Africa, which maintain good relations with Israel. In the current tourism environment, it is possible to collaborate with Jordan by organizing tourism packages targeting Islamic countries whose citizens have not visited Islamic attractions of Al Quds²²³.

5.3.3.2. Economic Issues

In the world tourism market, the rising popularity of the Middle East and Arab countries can contribute to increasing demand for Al Quds, which is already well known. In addition to that, the increasing numbers of Muslim tourists and also emerging types of Islamic religious tourism including halal tourism have also great potential for Al Quds. Attracting tourists from Islamic countries would have a major impact on the Palestinian tourism industry in Al Quds. This way, Palestinian business will benefit the most both economically and socially.

²²² Ibid.

²²³ Jafari and Abdullah, 2019.

New tourism markets are emerging. Therefore, in addition to religious tourism, new products (ecotourism, trekking, nature tourism, solidarity tourism etc.) and new markets (such as Palestinian diaspora, Muslim countries, South American countries, Asian countries—especially China and India-) would help to improve the situation in Al Quds, both for the tourism sector and also for socio-economic conditions. Involving of tourism activities/festivals can be renewed and refreshed to offer and utilize new tourism types²²⁴.

In recent years, as an indicator of international cooperation, the number of multinational joint projects/businesses have increased. As a result of new trends in the tourism market and the increasing demand of people for new markets, cooperation with Asian and European businesses can be increased, as well as international programs and practices can be implemented for Arab and Muslim entrepreneurs and business people to cooperate and make joint investments with Palestinian tourism professionals.

5.3.3.3. Social Issues

The modern tourists look for spiritual or emotional experiences and authentic places. Self-fulfilment during a holidays is becoming more important. What is being offered as services should take into account emotional worlds and needs of the tourists. Demand for experiencing "local" and "authentic" culture and interacting with traditional local people are becoming indispensable factors of the holidays. Therefore, local life styles, cuisine, clothing, traditional crafts, and dances are getting a central role in tourism industry. These trends provide great opportunities for the destinations such as Al Quds.

Moreover, beyond many problems and threats it poses to present and future, the COVID-19 pandemic can be seen as a new test for the tourism sector, and a great opportunity to transform the sector and to find new and innovative ways for healthier and sustainable development.²²⁵

5.3.3.4. Technical/Technological Issues

Technological improvements introduce many opportunities for consumers, destinations, and businesses. For example, tourism products have been diversified providing limitless opportunities thanks to virtual applications, and their increased availability and accessibility. Destinations now have more channels to reach and contact their current and potential markets. Hence, promotional activities are diversified but this also brings very tight competition, since every destination and company have the same opportunity. Another example is the variety of service providers and online payment gateways.

5.3.4. Threats

5.3.4.1. Political Issues

Continuation of the Israeli occupation is the biggest threat. Reinforcing the perception of lack of security and stability would prevent the creation of the "Palestine" tourism brand. The absence

²²⁴ MoNE, 2014.

²²⁵ OECD, 2020.

of Palestinian state institutions in Al Quds would lead Palestinian tourism businesses to be alone and prevent them from developing and operating in line with the Palestinian tourism policy. This problem emphasizes the need for an effective organization.

Controlling access and mobility in Al Quds by Israel would disrupt transportation both within Al Quds and among other Palestinian neighborhoods. Another negative aspect of occupation is its potential to restrict Arab and Muslim tourists visiting Al Quds.

Beyond the great damage to the cultural areas in the Palestinian regions due to military interventions and struggles, the pressure on Palestinian establishments in the Old City would continue and unfortunately, destroy the Palestinian identity there, if the occupation continues.

5.3.4.2. Economic Issues

Another threat comes from businesses in other Palestinian territories. Businesses in Al Quds cannot keep their prices low, since they have to deal with more financial burdens compared to the rest of Palestinian territories. Therefore, failure to offer competitive prices compared to facilities in Bethlehem and other Palestinian areas poses a great danger for Al Quds businesses²²⁶. Therefore, the relations of Al Quds tourism with partners in other Palestinian lands should be tightened and organized.

The COVID-19 pandemic probably does not simply mean the interruption of a growth trend; many companies are at a turning point. It can be easily argued that the pandemics will accelerate structural changes; many developments expected in the future development are now suddenly being experienced in the present. Unfortunately, today, it is almost impossible to predict how long COVID-19 pandemic would last and also how the pandemic would evolve. Therefore, it will take some time to see its overall impact on societies and economies.

However, it is also clear that COVID-19 has affected the tourism industry very badly, both the supply and demand sides²²⁷. OECD²²⁸ states that pandemic would result in a loss of 2% in annual GDP growth and a 60-80% decline in the international tourism in 2020. This means a loss of USD 0.9– 1.2 trillion in tourism revenues²²⁹ and of more than 100 million in jobs²³⁰. For example, just in Israel alone, 4,000 tour guides became out of work²³¹. That is why tourism sector requires urgent support not only to survive, but also to assure the sector's capacity in the aftermath of the pandemic ²³².

²²⁶ Jafari and Abdullah, 2019.

²²⁷ UNWTO, 2020a.

²²⁸ OECD, 2020.

²²⁹ UNWTO, 2020d.

²³⁰ WTTC, 2020.

²³¹ OECD, 2020.

²³² UNWTO, 2020c.

5.3.4.3. *Social Issues*

The negative perception about Palestine and Al Quds may increase if the political condition in the region continue or even worsen. In addition, the increase in Islamophobia, and prejudices against Muslims may deepen the problem of negative image, especially in Western societies.

Finally, due to the COVID-19 epidemic, the perception for health threats became prominent all over the world and the tourists adopted new reservations towards travelling. If Palestine and Al Quds cannot create a healthy, clean and hygienic destination image among tourists (it should be remembered that tourists strongly emphasized need for cleanliness of facilities very clearly), the tourism industry will experience major problems in the near future.

Therefore, it would be useful to focus on the COVID-19 outbreak in detail.

5.3.5. Horizontal Issue: COVID-19 Pandemic

Since 2007, the trend towards immigration from rural areas to cities has continued worldwide. Europe and America are already 70% urbanized. It is estimated that around 70 to 80% of the world's population will live in cities by 2052²³³. Health marks personal status and becomes the highest social value. People are constantly looking to optimize their mental and physical health and well-being. Life expectancy will continue to increase and people want to experience their life time consciously. Slow food as part of the slow living movement is becoming more important and directing attention to the natural processes of life such as food, exercise, sleep and relaxation. Eating does not only serve to celebrate the self but should enable the body to live a long and active life.

In light of the experiences, it can be stated that tourism has recovered after crises with the help of the interconnectedness of the global economy, which increased business travel²³⁴. For example, between 2010 and 2018, while employment in other sectors increased by 11%, the tourism sector experienced a 35% increase²³⁵. However, after the pandemic, it is predicted that it would take at least two years to recover tourism²³⁶. Therefore, adapting to new circumstances is of great importance.

In highly developed markets, ownership of goods becomes less important. Overall, the proportion of leisure time continues to increase. Leisure time is becoming a central part of modern identity. People are increasingly striving for inner instead of outer happiness. Many people opt for more leisure time and quality of life and the new status symbols are spiritual or emotional. Short-term access to comfort, luxury and self-fulfillment are becoming more important. The diversified services should also focus on emotional worlds. The new status

²³³ Borkmann/Klein/Lambertus, 2016, 20.

²³⁴ Fritz, 2020.

²³⁵ UNWTO, 2020c.

²³⁶ OECD, 2020.

symbols include experiences, beauty, health, mental flexibility, virtual identities and good sleep²³⁷. Future value creation is based on offers that can provide meaning and guidance. Vacation serves the purpose of self-realization and the redemption of personal longings. Therefore, sustainable and meaningful tourism must have even more priority than ever²³⁸. As the health concerns gaining more importance, health-promoting offers are also becoming important²³⁹.

Simply strengthening marketing would be too short-sighted, as this can at best meet only temporary demands. There is a risk that the accelerated social change and the ever changing guest requirements would be overlooked and that the offer would not be adequately further developed. But this is exactly where tourism companies and destinations have the opportunity to position themselves stronger in the market with realignment for the time after the crisis and to have an attractive offer for tomorrow's guests. Such periods of upheaval should be used to position for the future.

It is crucial to develop steps to effectively identify and deal with symptomatic tourists and employees. Therefore, employees should be trained about prevention of COVID-19 spread and general occupational health and safety rules such as physical distance and hygiene. It is also important to teach and remind them to wear a face mask when dealing with guests, colleagues, or service providers. On the other hand, employees should also be trained and informed how to respond to a COVID-19 infection.

Furthermore, tourism businesses and service providers must inform their clients at reservation or booking, about the regulations that tourists must follow to ensure safety. Before completing the booking, tourists and customers should confirm that they read these regulations. Easily understandable and clearly visible signs should be placed to remind tourists, visitors, and employees of hygiene measures and physical distance rules²⁴⁰.

Accommodation facilities should also inform the customers that they should have health insurance and that if they feel ill or have contacted with someone infected, they must stay in the room and inform the reception desk by phone. Facilities should also set apart at least one equipped room to isolate infected or suspicious cases until they get medical treatment²⁴¹.

Online and/or contactless reservation, check-in and payment methods should be employed wherever possible, such as in accommodation facilities, restaurants, cafés, gift shops, museums, sites, mosques, churches, and other facilities. Use of automatic check-in/out kiosks in hotels, transport terminals and attractions may be a solution. The facilities must assure inspecting all rooms, public areas or sections. Affected areas must be remediated before allowing new guests

²³⁷ Scharnigg, 2018, 57.

²³⁸ Fritz, 2020.

²³⁹ Borkmann/Klein/Lambertus, 2016, 24.

²⁴⁰ MoTA, 2020.

²⁴¹ Ibid.

in those areas. Capacities should be arranged not to exceed one person for every 4 square meters. The vehicles should be disinfected before passengers arrive and after they leave. Historical/religious sites, museums, parks etc. should be accessed by reservation and they should be disinfected before the groups' entering (i.e. after the previous group leaves). In historical and religious places, visitors should be able to download audio systems to their phones/tablets and listen the guiding information on their personal headphones. The downloading may be charged (like renting the audio devices in traditional systems) by providing a single-use password to those who pay the fee²⁴². Moreover, some measures should be taken to minimize the contact, for example, the use of electronic candles instead of the classical candle burning ceremony in churches.

The measures to ensure the survival of the tourism sector during and after the pandemic are stated below.

Measures during the Pandemic

Financial support

Short Term (Urgent)

As mentioned in the interviews with Palestinian tourism professionals, more than 50% of SMEs may go bankrupt²⁴³. In addition to losing customers, tourism SMEs cannot afford the costs of new operating protocols. Therefore,

- Incentives and funds should be provided to companies to retain their workforce.
- Incentives should also be promoted to provide training for individuals who left their jobs.
- Travel and tourism businesses should be supported with emergency funds and programs to ensure that they can avoid bankruptcy and resume operations after pandemic.
- Some grant programs should be designated for micro businesses, self-employed and entrepreneurs to help them survive the ever changing conditions. For example, although not directly related to the tourism industry, the Israeli government has announced an 80 billion ILS (USD 22.4 billion) support plan for SMEs²⁴⁴.

Measures for the Post-COVID Period

Having the confidence of tourist and re-acting the demand.

People are already unsettled by threats such as global warming, digital data theft, terrorism, natural disasters or the spread of digital and organic viruses. This leads to people withdrawing more and investing in what is safe and familiar. Therefore, the recovery on the demand side

²⁴² Ibid.

²⁴³ OECD, 2020.

²⁴⁴ Ibid.

would take longer compared to past crises, given the interrelated economic and health impacts of the pandemic and the gradual easing of travel restrictions²⁴⁵. As a result, it is becoming increasingly important for hotels to offer guests a familiar and safe environment. This means ensuring the highest possible level of security about personal data, image material about guests and security systems for areas that are only accessible to staff and hotel guests²⁴⁶.

Short Term Measures

- A certification system should be implemented to document which Al Quds facilities are COVID-free. For this purpose, international cooperation can be built with OIC member countries.
- Facilitation of visa policies such as e-visa/visa on arrival/no visa policies are also important measures. Visa issue has become more important for Al Quds due to COVID-19. Because, tourists would be discouraged to visit Al Quds, in case of visa and/or entry problems in addition to COVID-19 concerns.

Skills development

Short Term Measures

- Trainings should be provided for tourism sector employees on subjects such as developing / serving new products and the development of digital skills, for post-COVID-19.
- Employers and workforce should be brought together with minimal contact, for example, by online tourism employment fairs or platforms.

Middle Term Measures

- In partnership with universities and other education institutions, free online training programs should be developed for those who are most economically affected, such as the unemployed or seasonal workers. For example, the Palestine Tourism Recovery Taskforce has developed the "Jahzeen.ps e-Learning digital platform" to train employees and managers working in accommodation, F&B and transportation businesses as well as in other related sectors, about the processes, standards and protocols required for post-COVID-19 period. The curriculum, divided into courses, is designed to guide users through the learning process and to test users after each lesson. After completing the program, if the trainees are successful in the tests, they are "certificated", and if they fail, they must complete the course again²⁴⁷. Similarly, the Israeli Ministry of Tourism runs webinars and web-based courses for tourism professionals²⁴⁸.

²⁴⁵ Ibid.

²⁴⁶ Borkmann/Klein/Lambertus, 2016, 40.

²⁴⁷ MoTA, 2020.

²⁴⁸ OECD, 2020.

Promotional activities***Middle Term Measures***

- In addition to the digital transformation of businesses, the digital marketing capacities of the destination and businesses should be supported.
- Markets, products and services should be diversified. In this framework, virtual tours, augmented reality packages or programs and digital applications showing COVID-free facilities, or local cuisine/ handicrafts shops, should be developed.

Improving domestic tourism***Short Term Measures***

- Given the uncertainty for international travel in near future, domestic tourism obviously will play an important role in sector's recovery. Therefore, it is important and almost obligatory to develop products and services covering special tours, activities, programs and prices for domestic tourists.

The findings of the analysis and the proposed strategies are shown briefly and collectively in the Table 10 and Figure 29 below;

Table 10 SWOT and PEST Analyzes

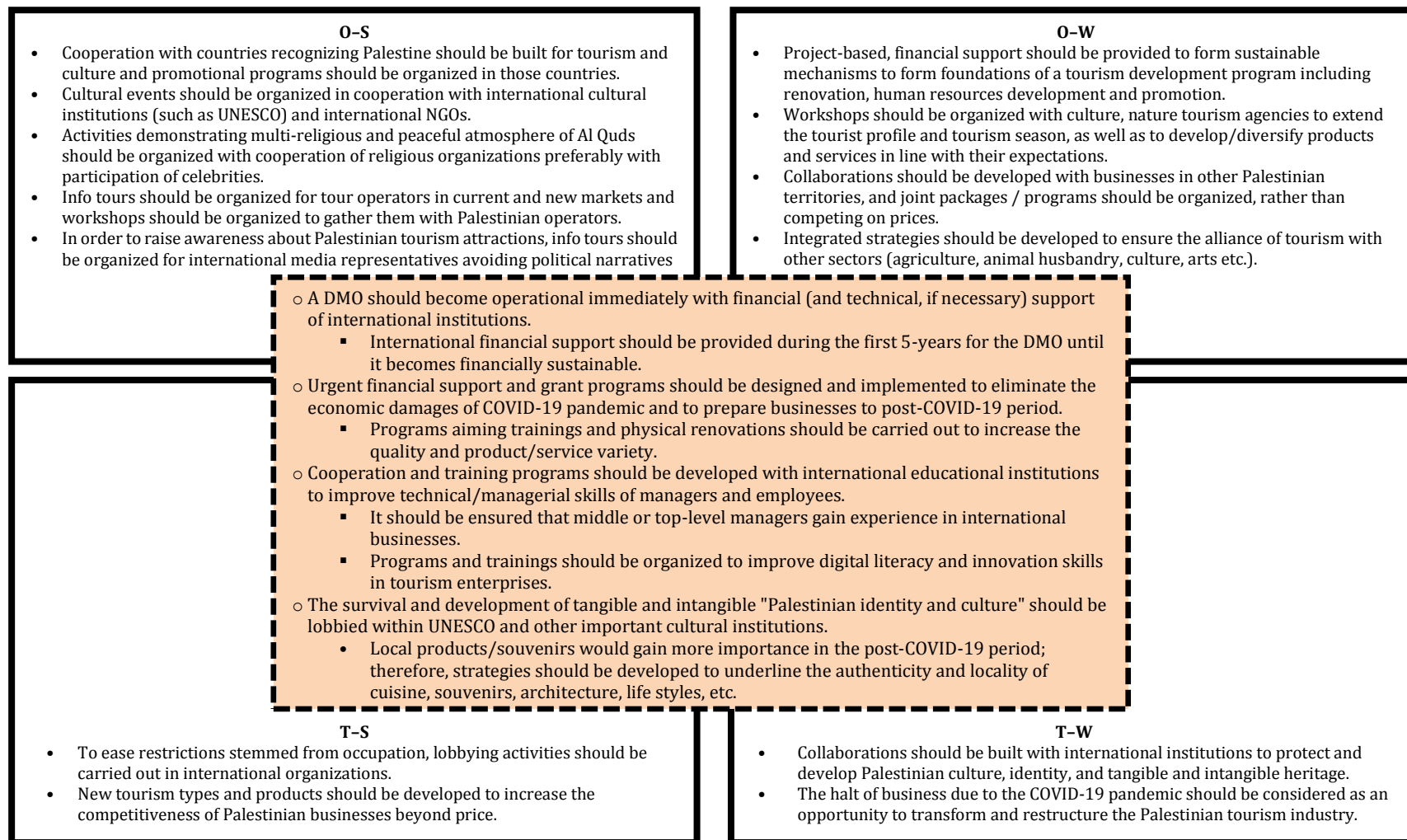
		SWOT			
		STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
PEST	POLITICAL	<ul style="list-style-type: none"> • Familiarity among tourists worldwide • The importance for all Abrahamic religions • Diversity of historical and cultural sites • The highest density of World Heritage Sites • Palestinian identity and oriental life style and architecture of the city 	<ul style="list-style-type: none"> • Lack of / weak ties with regulatory bodies and processes • Weakness in internal and external cooperation • Inefficiency in sectoral organization • Weakness of institutional capacities • Legal framework and public support not effective for Palestinian businesses • Value of heritage not addressed properly • Futile supports provided by international institutions • Deficiencies in tourism infrastructure • Reservations about investing due to fluctuations in the sector • Environmental problems such as littering, traffic congestion, water pollution • Lack of promotion and publicity • Ineffective lobbying activities of both private and public sectors • Limited reach to tourists from Arabic countries 	<ul style="list-style-type: none"> • Strong expression of the Organization of the Islamic Cooperation (OIC) that Islamic society is in solidarity with Palestinians and that will continue to support the Al Quds economy and institutions and people in social matters (especially education)²⁴⁹. • Increase in the number of multinational organizations to which the Palestinian state is member • Increase in the number of states recognized Palestinian state • Increase in global awareness about rights of Palestinians • Increased support and lobbying of international volunteer groups on Palestine • Increased international support for the Palestinian case • Increased interest of the international media to the region • Developing international cooperation • Opportunities for joint businesses 	<ul style="list-style-type: none"> • Continuation of current political conflicts and the lack of peace environment • Continuation of Israeli occupation • Continuation of the absence of Palestinian state institutions in Al Quds • Continuation of Israeli policies neglecting the Palestinian people • Attempts for annihilation of Palestinian identity in Al Quds
	ECONOMIC	<ul style="list-style-type: none"> • Readiness to Halal-travel • Proximity of attractions • Potential for differentiation tourism products • Locational advantages of facilities • Possibility to have tourism all year round • Presence of talented craftsmen • Competitive prices, compared to Israeli companies • Cooperation with Jordan 	<ul style="list-style-type: none"> • Products mostly limited to religious and historical tourism • High seasonality • Domination of Israeli companies in the market • Inability/deficiencies to access international distribution channels and dependence on Israeli businesses in this regard 	<ul style="list-style-type: none"> • Rising popularity of the Middle East and Arab countries in the tourism market • Emerging tourist sources from different parts of the world. • Increase in religious tourism • Emerging types of Islamic religious tourism and halal tourism • Increasing number of Muslim tourists • Willingness of international tour operators to work with Palestinian 	<ul style="list-style-type: none"> • Price dis-competitiveness against other Palestinian territories • Continuation of the stagnation in tourism sector in case the COVID-19 pandemic continues • Increase in tax rates • Fluctuations and declines in the world economy

²⁴⁹ Organisation of Islamic Cooperation (OIC), (2020) declared the support for Palestine in many summits; such as in the 4th Extraordinary Session of the Islamic Summit Conference "Promotion of Islamic Solidarity" in Makkah al-Mukarramah (14-15.08.2012), the 5th Extraordinary Islamic Summit on Palestine and Al-Quds Al-Sharif "United for A Just Solution" (07.03.2016), the 6th Extraordinary Islamic Summit Conference on Al-Quds Ash-Sharif (13.12.2017), or the 7th Extraordinary Islamic Summit Conference (18.05.2018).

			<ul style="list-style-type: none"> • Lack of financial resources mainly for further investment and promotion • Heavy tax burdens. • Standstill in tourism activities due to the COVID-19 outbreak • Lack of financial management skills of businesses • Need for modernization and physical restoration • Lack of entertainment alternatives for tourists (Games, Festivals) • Lack of awareness among citizens about importance of tourism. • Weakness and foreign dependency in economy. • High unemployment rates • Labor-intensive Economy 	<p>operators if the necessary standards are met</p> <ul style="list-style-type: none"> • Increasing international funding opportunities to improve social and physical infrastructure 	
	SOCIAL	<ul style="list-style-type: none"> • Strong and sincere hospitality culture • Rich local culture, arts and handicrafts • Rich cuisine • Multilingual youth • Low crime rate 	<ul style="list-style-type: none"> • Negative image for security • Low awareness about Israeli legislation system and laws • Low level of knowledge about legal rights • Difficulties in having proper legal consultancy • Depleted education system due to the practices/policies of the Israeli government • Weaknesses in human resources • Low quality/capacity in labor • Deficiencies in management skills of entrepreneurs/business owners • Indifference/resistance of managers/owners to new management/marketing practices 	<ul style="list-style-type: none"> • Diversified demand of “modern” tourists • Widely accepted belief in restructuring tourism industry to be prepared for post COVID period 	<ul style="list-style-type: none"> • The disappearance of the authentic handicrafts, skills and culture of Palestine. • Increase in Islamophobia, and prejudices against Muslims • Possible failure to survive during the COVID-19 outbreak
	TECHNOLOGICAL	<ul style="list-style-type: none"> • Fair infrastructure for Wi-Fi connection for tourists. 	<ul style="list-style-type: none"> • Low technological capacity • Inefficient use of technology • Dependency on Israeli companies in technological problems/solutions • Deficiencies in websites (no reservation/payment systems) • Inadequate use of internet technologies in both marketing and managerial aspects. • Lack of technological innovation 	<ul style="list-style-type: none"> • Increased/diversified technological channels that could be used for promotion and marketing • Presence of variety of service providers and online payment gateways 	

Source: By authors own

Figure 29 TOWS Matrix





6. Value Chain Analysis

The concept of “value chain”, which can be defined to be an activity set needed to produce a product from its first stage to its delivery to end-users and even after, has been applied to various sectors since mid-1980s, when it was first introduced by Michael Porter²⁵⁰. Competition in every sector and business depends largely on increased value-added with minimized costs or expenses. One of the sectoral fields where the value chain has long been used for sectoral analysis and the development of strategies over specific regions is tourism.

Since the economic value that tourism sector provides comes from all kind of tourists’ receipts, value chain analysis of tourism sector at a destination should be concentrated mostly on the clients’ satisfaction level (tourist’s pleasure or experiencing the best). Therefore, value chain analysis methodology in tourism is focused to evaluate client satisfaction before, during and after travel and investigate the possibilities to increase the value of tourism activities by taking or encouraging measures and preventing or removing obstacles or its development. It can be concluded that the value chain for the tourism sector at a destination means considering every actor dealing with tourists directly or indirectly to provide the best experience and pleasure for them. Value chain specific to tourism sector implies a process where private and public sectors together with non-governmental and community-based organizations (NGOs and CBOs) can obtain or create required resources as inputs and added value by performing various efforts such as development planning, branding, marketing etc., and present the end product (or services) to clients (tourists)²⁵¹.

250 Porter, 1985.

251 Hawkins and Nikolova, 2005.

6.1. Tourist's Experience Approach

It is not misleading to accept tourism as an industry composed of activities and services offering unforgettable experiences during travel of an individual or groups. These services comprise of transportation, accommodation, eating and drinking, shopping, entertainment, activity organization and other hospitality services. Therefore, the utmost purpose of the value chain analysis is to maximize tourist experience (Table 11), where all sides (actors) of tourism spend efforts to make it perfect. Tourist experience for a destination can be divided into three phases; as pre-trip i.e. from home to destination, on – trip, i.e. in the destination and post-trip, i.e. after returning back from the destination. These phases can also be considered as, decision making – organization, enjoyment, and evaluation, respectively. The value chain analysis is based on this three-phase approach as expressed below considering the components of each phase as actions, as well as primary and secondary actors. In the analysis, general value chain approach is outlined based on a literature review and then the phases, actions and actors are evaluated /identified by assessing the present situation and potentials of East Jerusalem (Table 12).

6.1.1. Pre-Trip (Decision/Planning/Travel Organization and Booking)

Tourist's travel experience starts with decision making, planning, travel organization and booking. In this respect, the actors promote their destination to influence the decisions of potential tourists and attract their attention to sell tour packages. For that reason, organization of the travel and the actors involved in the process are placed as the starting point of the analysis. Major actors at this phase at a local and national level can be identified as follows;

- **Travel agents and tour operators**, who promote themselves and the destinations they operate in,
- **Call centers**, which provide detailed information about a destination and also assist clients for all planning and reservation operations,
- **Airline companies**, which promote themselves and their destinations as well as support advertisement and promote operations in and out of the destination,
- **Promoted brands**, which belong to or are associated with a destination contributing to its promotion.
- **Official websites**, which directly promote, provide information and even help make reservations,
- **Responsible authorities for promotion**, which are officially responsible for the promotion of a destination.
- **Press & Media**, which can promote and strikingly present the destination and introduce its charms to international audience through their columnists and visual materials.
- **Marketing & Sales ICT**, which professionally perform consultancy services for branding and marketing a destination.
- **Support institutions**, which are public or civil structures (in)directly related to the tourism sector to support its development.

Table 11 General tourism value chain analysis scheme

Value Chain of Tourist's Experience									
Actors Actions	1.Pretrip	2. On Trip *						3. Post Trip	
	Promotion	Transportation	Accommodation	Food & Drink	Creative Industries	Tourism assets	Leisure and excursions	Support services	Quality assurance
	Travel Agents	Airlines	Hotels	Restaurants	Handicrafts and Arts shops	Cultural assets*	Shows	Information centers	Rating
	Tour Operators	Cruises and Ferries, boats	Apartments	Cafés and teahouses	Music, dance, artists, performers etc.	Natural assets**	Tourist guides' organizations	Grocery shops/retail outlet	R&D Institutions
	Airline Companies	Car, bike rental	Guesthouses	Fast food	Local bazaars	Authorities responsible for;	Tourism Packages	Internet/telephone	Guidance to tourism businesses
	Call centers	Coach, train, bus tram	Youth hostels	Patisseries and bakeries	Artisanal Centers/Souvenirs	Site signals	Guides and escorts	Security and medical services	Certification and Control Institutions
	Promoted brands	Taxi	Lodges	Itinerant food shops	Manufactures, cottage industries suppliers	Restoration	Wellness and spas	Bank & exchange	
	Official websites	Informal transportation	Camping places	Kiosks	Storage & Distribution	Management	Local guides	Technology shops/imports	
	Responsible authorities	Customs Office	Consumables	Food souvenirs	Handicrafts suppliers	Maintenance	Excursion and event operators	Laundry, oil station, hairdressers etc.	
	Press & media	Port Authority	Maintenance Services	Food producers		Coordination			
Marketing & Sales ICT	Ministry of Transport	Marketing & Sales ICT	Storage & Distribution						
Support Institutions	Immigration Agency		Drinks suppliers						
Construction, Energy, Water, Waste, Education, Communications, Public security and health									
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									

*



Directly related to tourism sector



Indirectly related to tourism sector

** Archaeology communities, ethnics, museums, tourism attractions, intangible cultural assets (music, dance, legends, etc.), festivals, etc.

*** Lakes, rivers, reefs and mountains, forests, species of flora & fauna, etc.

Source: Derived from the table in Casas (2019)

6.1.2. On Trip

- **Transportation;** as transportation is a long-lasting process (door to door) it covers different actors and operations. The process can be analyzed in two sections as in and out of destination involving airlines, cruises, coaches, trains and ferries, boats, car, bike rental, subway, bus, tram, taxi and informal transportation. Customs offices, port authorities, ministries of transport and immigration agencies are also included in this process.
- **Accommodation;** is possibly the most important part of the experience since visitors want to feel safe and comfortable during their stay. Destinations can offer various types of accommodation including hotels, rental apartments, guesthouses, youth hostels, lodges, camping places. Consumption materials, maintenance services and marketing and sales are also linked with operations on accommodation.
- **Food & Beverage;** is another important part of the pleasure the visitors are willing to experience. Delicious food and drinks (especially local ones) at affordable prices contribute a lot to satisfaction and loyalty of tourists. Restaurants, fast food sellers, local food shops, food & drink automats, souvenir food & drink automats, groceries, local, national and international food producers, suppliers, servers, storages and distributors are important actors in this link of the value chain.
- **Creative Industries;** are important not only for tourist satisfaction and loyalty but also in terms of increased tourism revenue for locals. In this respect, handicrafts and art shops, music and dance performers, artists, other performers, manufacturers, local bazaars, artisanal centers, cottage industries and suppliers, storage & distribution and handicrafts suppliers are among these businesses.
- **Tourism assets;** are main factors of attractiveness and the presence of only one or two can be sufficient to attract tourists. Cultural (e.g., archaeology communities, ethnics, museums, intangible cultural heritage, music, dance, legends, festivals etc.) or natural (lakes, rivers, reefs and mountains, forests, species of flora & fauna, etc.) are important assets increasing tourism values. Authorities responsible for the restoration, management and maintenance of such assets are also in the value chain.
- **Leisure and excursions;** local events and leisure activities function as touristic attractions and increase the duration of stay of tourists and increase revenues for locals. Activities such as shows, activities organized by tourist guides, tourism packages, wellness centers and spas and actors like transport, guides and escorts, local guides, excursion and event operators are in this part of the value chain.
- **Support services;** are very important complementary elements for ensuring tourists' comfort and satisfaction since they must find what they need to sustain their daily lives. Therefore, information centers, markets/shops, banks/exchange offices, internet/telephone, technology shops, gas stations, hairdressers and medical services etc. are located in this section of the value chain.

6.1.3. Post – Trip

To measure tourists' satisfaction level and the level of convenience of touristic facilities and services and their compliance with quality standards, some tools such as rating

portals/applications through which tourists present their (dis)satisfaction after completing their trips/visits have been developed. Besides, some research institutions perform surveys while some quality assurance societies/private certification and control institutions use field research tools such as mystery shopping. In this respect, the presence of such entities is an advantage to increase value-added in the tourism sector.

6.2. Value Chain of Tourism in Al Quds

Following the tourists' experience approach, the main value chain actors identified to be active in Al Quds as the result of the literature review and online interviews is presented in Table 12. As it is seen on the table, Al Quds accommodates nearly all relevant actors in pre, on and post-trip phases of the value chain which can help tourists to make decisions, perform activities and assess satisfaction for the destination by promoting the potentials, facilitating the operations, and delivering services.

Table 12 Possible actors in tourism value chain of the project area

No	Player	Area
1	Accommodation Facilities	2
2	Food and Beverage Facilities	2
3	Tourism agents- Tour Operators- Travel agents	1-2-3
4	Tour guide services	2
5	Information centers	2
6	Institutions providing skilled workforce	2
7	Knowledge/Educational Institutions	1-2-3
8	Media	1
9	Civil Society Organizations (CSOs)	1-2-3
10	Souvenir/gift shop SMEs	2
11	Basic services providers (health, banking insurance etc.)	2
12	Transport SMEs	2
13	Communications (telephone, internet etc.)	2
14	Entertainment SMEs	2
15	Archaeological areas and sites and Museums	2
16	Supply companies	2
17	Advertisement and Promotion Agencies	1
18	Marketing SMEs	1
19	Public Administration Institutions, Sector Representative Organizations	1-2-3
20	Local Administration	2
21	Research Institutions	1-2-3
22	Certification and Inspection Institutions	2
23	Young and women entrepreneurs, innovative enterprises	2
24	Education institutions	2

Source: by authors own

1 Pre-trip; 2 On trip; 3 Post-trip

6.2.1. Pre-Trip Actors

The actors identified to be present in the first phase of the value chain (pre-trip) are given in Table 13. This table is the extraction of the actors in Table 12 with the selection of actors related mostly to the promotion, organization and their contribution to the decision making of tourists coming to their destination.

Table 13 Actors of the first phase

No	Actors	Stage
3	Tourism Agents- Tour Operators- Travel Agents	1-2-3
8	Media	1
9	Civil Society Organizations (CSOs)- Professional Organization, Chambers, Commerce Environment and Sectoral Associations related to tourism. Community Organizations.	1-2-3
17	Advertisement and Promotion Agencies	1
18	Marketing SMEs	1
19	Public Administration Institutions	1-2-3
21	Research Institutions	1-2-3

Source: by authors own

1 Pre-trip; 2 on trip; 3 Post-trip

6.2.1.1. Tourism/Travel Agents and Tour Operators

Tour operators are at the heart of the tourism industry since their performance directly affects the profitability of the whole sector. In Al Quds business environment, tour operators have to undertake all operations on their own from promotion and research to accessing new markets and finding parking lots. Generally, they sell standard tour packages of pilgrimage or tours with cultural – historical content to mostly groups and less often to individuals. Operators market their services through their own web sites or web sites of the associations they are registered. Tour operators experience important challenges while passing through borders and check points at the airport and elsewhere. Following a brief analysis of operational conditions for local, regional and international tour operators in Al Quds, their sector-related associations are briefly described below.

Tour Operators Association: Members of the association play the most important role in the incoming tourism operations to East Jerusalem and Palestine. In order to consolidate their power, they established an association in 2005 under the name of Holy Land Incoming Tour Operators Association (HLITOA). HLITOA had 50 members throughout Palestine in 2019, who work on 60 different tourism operation types (Annex 3) including mainly pilgrimage in holy lands covering three to four countries, Palestine, Israel, Jordan and Egypt²⁵². More than half of the association's members (26 tour operators) are based in East Jerusalem. The association established a network among incoming tourism professionals and share the contact information of these professionals with the visitors to allow them to make their own choice of the service

252 HLITOA, 2020.

provider. Besides, the Association also performs promotion and marketing activities for the destination they serve²⁵³.

Even though the Association spends efforts for marketing and promotion of both East Jerusalem and Palestine, such efforts seem not to be managed professionally by following a common strategy adopted by all tourism stakeholders in the destination. Both members and the Association conduct promotion activities which may confuse the target group about the destination as each promotion effort have their own perspective depending on the tourism type they work on. Therefore, a higher council, a board or an organization one party of which will be HLITOA can be established with the aims of branding, marketing and promoting the destination by determining a road map, coordinating local tourism stakeholders for a common vision and future.

The Palestinian Society of Tourist and Travel Agents (PSTTA): PSTTA is a non-profit organization established in 2008 with the approval of the Palestinian Ministry of Tourism and Antiquities to represent Palestine's travel and tourist agents operated by the private sector. The Society aims to serve Palestine's travel and tourism agencies, support agencies for the sustainability of their commercial operations, ensure the validity of their licenses and promote the implementation of relevant regulations by the Palestinian Authority with 60 professional travel & tourism members, four of whom are East Jerusalem-based agents.

Basic aims and values of PSTTA may be appropriate for Palestinian tourism stakeholders and private sector except for East Jerusalem, where legal and political regulations and rules are different from the rest of Palestine. Therefore, there is a need for such a society working for the private tourism businesses belonging to Palestinians.

A list of the member businesses registered in the organizations mentioned above (HLITOA and PSTTA) and on the web site of Palestinian Ministry of Tourism and Antiquities (travelpalestine.ps/) is given in Annex 4^{254,255,256} and it is seen that there are 190 tourism – travel agents and operators providing services.

The Jerusalem Tourism Cluster (JTC: Enjoy Jerusalem); (<http://www.enjoyjerusalem.com/>); "Enjoy Jerusalem" is an officially established website to introduce Al Quds city. It is designed to give information to visitors all over the world about the culture (events or artistic activities) and tourism (attractiveness) in Al Quds by providing maps and photos including those of paths, trails and the holy lands. Besides, the website provides contact information for accommodation, food, events, museums, rental services, tour guides and operators.

²⁵³ Ibid.

²⁵⁴ PSTTA, 2020.

²⁵⁵ HLITOA, 2020.

²⁵⁶ Visitplaeatine.ps, n.d.

Such types of promotional webpages are seen to be very useful. However, unless supported by an official body, updated regularly and provide credible information, they can harm the image and perception of the destination. Instead of such fragmented several promotional web pages, a professionally operated portal enabling a series of services by a DMO – like structure including all stakeholders of local tourism is recommended.

6.2.1.2. Media

Media is important in its all forms for the tourism sector to construct an appropriate perception and image by contributing to the promotion and marketing of a destination. The role of media in tourism can be assessed by considering the quality and quantity of publications, broadcasts, authors and messages in favor of a destination. According to the Palestinian Academic Society for the Study of International Affairs (PASSIA), the number of local, national, and international media organs is 215 including all types of media from internet press to publications²⁵⁷. A list of media enterprises which are Palestinian originated or servicing for Palestine and East Jerusalem is given in Annex 5²⁵⁸. High number of media organizations can be attributed to the heavy political agenda of Al Quds but it should be noted that the media has also a key role in connecting local communities in Al Quds with the rest of the world.

Due to its tourism-related content and authors' expertise on tourism, an internet magazine in English, This Week in Palestine (www.thisweekinpalestine.com) publishes valuable promotional and sectoral information. This Week in Palestine, (TWiP), the first and only magazine in English, was first published in December 1998 to help the promotion of Palestine and also serves today to promote tourism with various activities in the fields of design and printing.

Tourism has close relationships with press and media to promote, create and manage the image and perception. This issue is more important for Palestine and East Jerusalem compared to elsewhere in the world due to the dense and reverse perception created by Israeli administration. In this respect, this area requires a very sensitive and professional approach in order to be affected to a lesser degree and to reach an advantageous position. A professional structure is needed to coordinate the relations with media and press and manage PR and lobbying activities by involving all the stakeholders of tourism as well as other segments of the community due to the political sensitivity. This duty also coincides with the responsibilities of a specific DMO-like tourism structure.

6.2.1.3. Civil Society Organizations (CSOs)

Civil Society Organizations (CSOs) related to tourism can help improve the sector by contributing in terms of promotion and marketing, increasing service quality standards and thus tourism revenues. In this respect, unions/associations of the private sector are considered effective and most governments in the world support these structures legally and financially.

²⁵⁷ PASSIA, 2020.

²⁵⁸ ABYZ News Links, 2020.

From an overall perspective, tourism-related commercial, environmental, sectoral development and community-based organizations (CBOs) tried to be evaluated and listed in the analysis. According to the categorization on the web site of PASSIA, there are three groups of civil based professional organizations; Associations & Unions (72), Chambers of Commerce (15) and Communities or Institutions on Environment & Water (30) as given in Annex 6²⁵⁹. Only four of these organizations have East Jerusalem or Al Quds in their names. In addition to these organizations, local international CSOs are also listed on the website as NGOs – Non-Governmental Organizations (128), these are Coordinating Groups, Canadian NGOs, European NGOs, US NGOs and Others & International NGOs²⁶⁰.

The presence of civil initiatives around a specific sector like tourism is vitally important in Al Quds since the public authority or governance of the Palestine side is not able to operate and the Israeli side incessantly tries to separate Al Quds from the rest of Palestine. Therefore, success stories can be created only if a close coordination and collaboration between these civil initiatives is achieved.

It is very difficult for any of the Palestinian organizations in Al Quds to obtain official or financial support from Palestine Authority out of brotherhood relations. Besides, Israeli Government also intervenes every time with the intention to obstruct improvements in tourism sector through civil initiatives for various reasons as experienced in the past in the case of closing Higher Council for the Palestinian Tourism Industry office in Al-Quds by the Israeli Government, which was among the leading attempts to construct an umbrella structure to develop tourism in Palestine. This council worked for some time as a professional example of destination management organization with a director, staff, strategy and seven registered members i.e. Arab Hotel Association, the Tour Operators' Association, the Arab Tourist Guide's Union and those representing travel agencies, souvenir shops, airline companies and restaurants. This structure succeeded in finding fund from abroad, GIZ, German Cooperation²⁶¹. It developed good relations with the Palestinian Ministry of Tourism and Antiquities to improve the conditions for tourism. For this aim, a legal framework proposal for a public-private partnership was also suggested by the Council.

After the closing of the Council, tourism organizations got weaker and representative organizations of some subsectors disappeared, only those related to hotels, the tour operators and the tour guides remained. Two new organizations were founded from tour operators' association, the Palestinian Society of Tourist and Travel Agents (PSTTA) (outgoing and ticket-sales businesses) and the Holy Land Incoming Tour Operators Association (HLITOA). HLITOA included later representatives of hotels and guides but restaurants, airline companies, transport companies and the souvenir shops are acting on their own.

259 PASSIA, 2020

260 Ibid.

261 Saadeh, 2018.

Following the closing of the Council, a new organization, Network of Experiential Palestinian Tourism Organizations (NEPTO), was established to serve for community-based tourism development in Palestine by adopting a larger representation of the civil society organizations in tourism; PPCP model (public-private civil society partnership²⁶²). NEPTO conducted studies related to local tourism initiatives, alternative tourism groups, rural and cultural heritage festivals, fair trade and local-products organizations, wildlife and environmental associations, and architectural heritage centers focusing on unknown destinations.

Political instabilities between Palestinians and Israel deeply impact tourism businesses from any section of the tourism value chain e.g., hotels, events, souvenirs, food etc. In Al Quds by causing closedown in large numbers. In order to take measures for such shocks and risks and regain the losses in the tourism sector by utilizing the capacity and potentials of Al Quds, civil initiatives moved forward in Al Quds like Jerusalem Tourism Cluster (JTC).

CSOs and NGOs in Palestine and East Jerusalem have made good progress to add and increase value in tourism sector such as accessing foreign funds by collaborating with each other, functioning as an umbrella for tourism private sector to act together against challenges, increasing service quality as well as conducting marketing and promotion activities. In order to increase the number and extents of these achievements, all the civil initiatives are required to work closer than before under a broader inclusion adopting a common target for the development of tourism sector in East Jerusalem. From this point of view, civil organizations are experienced in offering and constituting new and more inclusive structures some of which are recently founded while others have been operational for a long time. Brief information about selected tourism organizations is given below.

Network of Experiential Palestinian Tourism Organizations (NEPTO): NEPTO acts as an upper organization for those working on community – based tourism development in Palestine and performs activities on the subjects like local festivals, local products, wildlife and environment and architectural heritage. Members of the Network are the organizations like youth clubs and women initiatives and private sector representatives like local product producers who spend efforts for the improvement in the similar subjects to develop tourism and increase income sources in less or not known historically and culturally rich destinations. The main target of the organization is to increase welfare among the local community by using and protecting the resources, cultural heritage, and environment and tourist products in Palestine. The member organizations conduct promotional activities and lobbying for the community – based tourism possibilities in Palestine by attending national and international organizations. NEPTO works to increase solidarity and cooperation among its members by assisting weaker ones technically and financially even though at small rates. The Network has a very informative and promotional website (<https://nepto.ps>)

262 Saadeh, 2018.

Al-Quds Tourism and Heritage Council (ATHC): ATHC serves as an umbrella organization for all sides of tourism sector working in Al Quds on the cultural, educational and CBO subjects. ATHC spends efforts for marketing Al Quds as a tourist and cultural destination and conduct specific cultural and touristic activities at local and international levels by working with its member associations performing in various subsectors including those other than tourism and culture like commerce and education. The Council adopts the idea of developing local tourism destinations based on community taking the advantages of great diversity and richness of local destinations. Member organizations are Al-Quds (Jerusalem) Chamber of Commerce, Arab Hotel Association (AHA), Holy Land Incoming Tour Operator Association (HLITOA), Arab Tourist Guide Union (ATGU), and Al-Quds (Jerusalem) Tourism Cluster (JTC).

The Arab Hotel Association: The Arab Hotel Association (AHA) founded officially in Al Quds in 1962 represents Palestinian hotels across the Holy Land while helping tourism development in Palestine by taking part in other societies related to tourism and even supporting government agencies. The number of AHA – member facilities exceeds 100 having more than 10000 rooms²⁶³.

Jerusalem Tourism Cluster; JTC functions as a non-profit network linking actors from different and related fields of the tourism sector in Al Quds, e.g., tourism, commerce, professional and educational organizations in the tourism industry²⁶⁴. The Cluster was founded after the crisis in tourism sector caused by Israel's attacks and political instability for the purposes of coordinating Al-Quds-based tourism initiatives and giving the tourism sector its previous central role in the city.

Tourism and Art Jerusalem Cluster, TAJ Cluster, is composed of tourism enterprises, companies, institutions and individuals performing in East Jerusalem such as hotels, tour operators, handicraft and, jewelry shops, restaurants, souvenir shops, transportation companies, heritage shops and tour guides. TAJ Cluster is a business-oriented body that tends to formalize the relationship between all players in the industry to establish strong synergy with the public sector and other supporting institutions to integrate all efforts to support and develop the sector²⁶⁵.

6.2.1.4. Advertisement and Promotion Agencies

VisitPalestine Website (<http://visitpalestine.ps/>): This website functions as a guide of Palestine to assist tourists to decide and plan their travel by presenting them a wide range of information about touristic and historical areas. Religious, historical, cultural and natural assets of the country are presented on the website by providing detailed information about their working hours and visual presentations. On VisitPalestine website, following actors in Annex 7

263 AHA, 2020a.

264 EnjoyJerusalem, 2020.

265 Palestine Cluster, 2020.

are given as the supporter bodies to the culture and tourism of the country by contributing to the website²⁶⁶.

Travel Palestine Website (<http://www.travelpalestine.ps/>): This website belongs to the Ministry of Tourism and Antiquities and offers a wide range of information to visitors including practical information about places, accommodation alternatives and the tours offering different routes.

The Alternative Tourism Group (ATG) (<http://atg.ps/>): The ATG founded in 1995 as an NGO in Palestine and works more densely on pilgrimage tours covering cultural, religious and historical sites in the Holy Land to improve the socioeconomic benefits of local people from tourism activities in a sustainable way.

6.2.1.5. Public Administration

The list of public institutions is given in Annex 8²⁶⁷. Among them, the main institution responsible for tourism is **Palestinian Ministry of Tourism and Antiquities (MoTA)**, authorized and specialized on all the matters related to the Palestinian tourism sector from promotion, standardization, coordination to development and implementation of national tourism strategies.

However, due to political and legal challenges in East Jerusalem, Palestinian tourism businesses cannot get benefit from any type of supports offered by both MoTA and other institutions. In addition, Israeli Government's negative attitude towards the Palestinian tourism business owners in terms of developing their businesses is also well-known. Therefore, Palestinian tourism private sector representatives in East Jerusalem face challenges resulting from the lack of a governmental and institutional body to ease their legal and political operations, perform promotional activities to increase the number of tourist, develop and follow-up statistics and provide financial support at times of crises or when needed for growing their business. When such basic needs are not covered officially, sector representatives try to solve their problems individually or through some association. Within this context, a legally acceptable, strong, inclusive and actively working civil tourism structure can ease the challenges and relieve the burden on Palestinian tourism businesses in East Jerusalem.

6.2.2. On – Trip Actors

This section of the value chain is where tourists experience all the realities of a destination and collect memories. They face real actors in the area and their experience, pleasure and perceptions take shape at this phase. Main actors in this section of the value chain are given in Table 14.

²⁶⁶ Visitplaestine.ps, n.d.

²⁶⁷ PASSIA, 2020.

Table 14 Actors of on -trip stage in the project area

No	Actors
1	Accommodation Facilities
2	Food and Beverage Facilities
4	Tour guide services, Palestinian Guides Union
5	Information centers
6	Institutions providing skilled workforce
10	Souvenir/gift shop SMEs
11	Basic services providers (health, banking insurance etc.)
12	Transport SMEs
13	Communications (telephone, internet etc.)
14	Entertainment SMEs
15	Archaeological areas and sites and Museums
16	Supply companies
20	Local Administration (Special Provincial Administration, Local Service Unions, Municipalities)
22	Certification and Control Institutions
23	Young and women entrepreneurs, innovative enterprises
24	Education institutions including Islamic religious authority

Source: By authors own

6.2.2.1. Accommodation Facilities

Accommodation facilities are among the most important actors in the tourism value chain since these facilities play important role in shaping tourist satisfaction and increasing tourism revenues. In East Jerusalem, there are four no starred hotels, two 5 – star, one 4 - star and one 3- star hotels²⁶⁸. Accommodation service is given in Palestine and East Jerusalem by hotels, guest houses, hostels and other facility types. List of accommodation facilities taken from Arab Hotel Association's (AHA) website and PASSIA²⁶⁹ is given in Annex 9.

Accommodation facilities are keys to increased tourism revenues by providing the best possible quality service and achieving tourist satisfaction. Accommodation services in East Jerusalem are able to provide tourist satisfaction however in high seasons their capacity is not enough to meet the demand. The number and capacity of the facilities decrease each year being affected by the Israeli's political approach by causing transformation of hotels into office buildings or for other use as the result of economic and financial difficulties and by not giving permission for the renovation of the buildings. In order to meet the high demand and manage the circumstances new solutions are required such as increase of homestays under a well-planned coordination. A coordinating body can also serve hotels to increase service quality by issuing certificates when they meet certain criteria. The average occupancy rate of the accommodation facilities is high nearly throughout the year with the increase in the number of Muslim visitors, which is very important to break seasonality.

²⁶⁸ AHA, 2020b.

²⁶⁹ PASSIA, 2020.

6.2.2.2. Food and Beverage Facilities

Presence of F&B facilities to supply tourists with meals and drinks is one of the most important link on the tourism value chain. In Al Quds, both restaurants and many hotels offer F&B services. A list of F&B facilities in Al Quds is presented in Annex 10. If managed appropriately, F&B segment of the tourism value chain can present several new opportunities to tourism professionals and other local people because these facilities have to buy their materials from outsources instead of local products and food.

Visitors in East Jerusalem, generally pilgrims, are reported to eat breakfast and dinner at their hotels and for lunch, they generally have snacks at the points on their routes to the sites. Food and drink serving points contributes comfort of a trip especially when following a specific route as in Holy Lands. As can be seen in Annex 10, Al Quds can offer a wide range of such points.

In order to increase the benefit of tourism to local people and economy, presence of local food and drink shops are vitally important. In East Jerusalem, there is a need to increase the quality, diversity and number of cafes and restaurants offering local dishes. In addition, there is a need for the regulation of their working hours by considering the tourists' demand at night. From this point of view, a coordination entity is needed again as in other sections of the value chain of the sector.

6.2.2.3. Tour guide services

Tour guides are important actors in the value chain ensuring tourist satisfaction and loyalty. In East Jerusalem, tour guides are licensed by Israeli Authority and Palestinian civil organizations e.g., the union can give them refreshment courses and certificates. On the web site of Arab Tour Guides' Union (ATGU)²⁷⁰, it is observed that 83 guides are registered to the Union and deliver services. Distribution of these guides by their language skills is given in Table 15.

Table 15 Language list of ATGU

Language	Number	Language	Number	Language	Number
English	83	Portuguese	2	Danish	1
French	15	Romanian	2	Slavic	1
Spanish	10	Russian	2	Hungary	1
German	9	Greek	2	Polish	1
Italian	8	Norway	1	Indonesian	1

Source: ATGU (2020)

It is reported that even though the Palestinian tour guides in East Jerusalem are friendly and easygoing, there is a need to improve their qualifications, like language skills, knowledge about the religions and the narrative, cultural heritage and the sites.

²⁷⁰ ATGU, (2020).

6.2.2.4. Arts & crafts and Souvenirs

Palestine can offer several types of local arts and crafts products to visitors. Most popular ones are olive wood, mother of pearl, embroidery, pottery & carpets and olive oil soap, which are produced and sold by local small – size entrepreneurs. There is a need to plan local training and develop programs to support production of local products to design new souvenir products. In this context, a success story on local crafts production belongs to a non-profit NGO, Sunbula (<https://www.sunbula.org/>), which started in 1988 in Al Quds as fair trade organization through a project “craftaid” supporting local artisans and traditional Palestinian handicrafts especially women. Sunbula is today Palestine’s prominent craft provider supporting hundreds of women and their families. Other producers and sellers of souvenirs are given in Annex 11.

6.2.2.5. Museums, Festivals & Cultural Events

Events and other cultural activities are beneficial to the actors in tourism value chain in that it elongates the stays, increases receipts, enables cultural and social interactions and offers possibilities to tell the problems and cases to the other side. From this point of view, it is necessary that Palestine and East Jerusalem add new events and activities to the existing ones. Palestine and East Jerusalem have the potential to offer numerous cultural and musical events almost on daily basis and festivals on certain days can be organized to attract visitors regardless of their purpose of visit. In order for local people to benefit from tourism revenues, a detailed and attractive event calendar should be prepared and followed with the participation of local people, tourism businesses, schools like conservatory and community-based tourism professionals. A list of ongoing events and cultural centers are given in Annex 12.

6.2.3. Post Trip

6.2.3.1. Quality assurance

Post-trip activities related to a destination target measuring some parameters such as tourist satisfaction, loyalty level, and inclination of tourists’ suggestion of the destination. For this purpose, it is important to get feedback from visitors about their trips, experiences and the time they spent at accommodation and F&B facilities, ambience etc. After the collection of qualitative and quantitative information and statistical data, an analysis system is needed to evaluate and extract findings to market, promote and brand the destination, to define tourist profiles, to increase service quality and to provide reliable information to the prospect visitors. As the output of this systematic process, quality assurance is attained from the perspective of visitors and technical assistance and guidance can be given to tourism businesses to improve their service quality. In this respect, an organizational structure (such as a DMO) is a necessity to develop the mentioned quality assurance system in order to monitor, intervene and provide guidance to correct the faults using ICT and smart technologies. Such a structure can also be used to launch a quality certification, rating and guidance system for private sector tourism establishments.

In Al Quds destination, there is no clear and well-established quality monitoring/assurance system as described above. Therefore, in order to constitute a reliable and operational quality system, associations or unions should develop a system to encourage their members to be

included in it. In order to run such a system properly, it is not enough to involve only one tourism value chain component but following a gradually developing approach, all sector components should be included in the system through a concrete structure like DMO which can give supports, incentives and address profitability to the actors.

6.3. Clues from Tourism Value Chain Analysis in Al Quds towards a DMO Structure

As the conclusion of value chain analysis, it can be stated on the example of East Jerusalem that actors present in each section of the tourism value chain seem to be sufficient both in quantity and quality and they perform functions suggested above. Actors of the value chain are conscious and have high level of awareness about the past and future trends in the sector and how to manage the challenges and risks even what they need to do with those. In addition, sector – based civil initiatives, NGOs and CBOs have long been established and struggled to overcome daily or chronic problems by making collaborations, trying to find foreign funds, developing programs for training tourism workers etc. There are also efforts to act for a common target / vision by working together under an umbrella to develop the tourism sector. This analysis shows the need for a coordinating structure composed of the actors in East Jerusalem tourism value chain to function as an umbrella organization. In addition to these statements, specific outcomes from the analysis are also presented as follows.

1. Interventions of the Israeli government cause economic losses for tourism private sector in Al Quds and causes reduction of tourism value,
2. For tourism private sector in Al Quds to prevent themselves from risks and economic losses caused by Israel's practices, attacks and political instabilities, they have to develop a solidarity mechanism between local actors in the lack any official public authority, which is expected to turn out to be a DMO structure,
3. The civil organizational structure unique to Al Quds will be granted no financial and technical supports except for some capacity building projects implemented by some member organizations to ATHC,
4. Today tourism private sector and organizations are stronger in some areas like tour operators, accommodation and guides even if some of them remained weaker in Al Quds,
5. Normally Al Quds had an organizational structure in tourism sector involving nearly all components of value chain for a long time even though some part of this structure was closed by Israel. Therefore; there are experienced organizations and social capital to run a DMO structure effectively,
6. Even though there are several small- or large-scale organizations acting in tourism sector, they have difficulties collaborating, sharing duties, working in line with a strategic plan, therefore there is a need for the establishment or transformation of one of the existent organizational bodies into a DMO – like structure,
7. Since there were previous attempts to establish such a DMO structure, all the actors are experienced and there are already some organizations, which have enough capacity to function as DMO together with other organizations.

8. The analysis shows that there is a need for a new complementary tourism body (DMO) covering all the actors of the tourism value chain to regain the losses of actors and put the tourism in its central place.

Table 16 gives possible local organizations that can be included in the DMO structure with their key features to be utilized.

As the final remark, it should also be stated that the small businesses in the value chain should be supported to inject the required dynamism into the tourism industry in Al Quds since the mandate of the DMO and expectations from it as described in Section 9 will require innovative approaches which can only be achieved by introducing more small and medium scale enterprises in the tourism ecosystem.

Table 16 Roles of Organizations in Al – Quds Destination

Functions / Organizations	HLITOA	PSTTA	JTC	TWiP	ATGU	ATTU	ATG	NEPTO	AHA	TAJ	ATHC	TP	VP
Umbrella organization of NGOs, CSOs, CBOs													
Internationally funded project implementation													
Promotion and marketing													
International strategic partnership													
Training, technical assistance													
Finance / management experience													
Development of responsible tourism													
Incoming tourism features													
Outgoing tourism coordination													
Strategic planning													
Quality assurance system													
Local / tourism product development													
Events and exhibitions, festivals													
Tourism R&D													
Community-based tourism													
Business Development & Projects													

AHA : The Arab Hotel Association
 ATG : The Alternative Tourism Group
 ATGU : Arab Tour Guides' Union
 ATHC : Al-Quds Tourism and Heritage Council
 ATTU : Arab Tourist Transport Union (represents bus transport operators)
 HLITOA : Holy Land Incoming Tour Operators Association
 JTC : The Jerusalem Tourism Cluster
 MoTA : Palestinian Ministry of Tourism and Antiquities

NEPTO : Network of Experiential Palestinian Tourism Organizations
 PSTTA : The Palestinian Society of Tourist and Travel Agents
 PSTTA : The Palestinian Society of Tourist and Travel Agents
 TAJ : Tourism and Art Jerusalem Cluster
 TP : Travel Palestine Website
 TWiP : This Week in Palestine
 VP : VisitPalestine.ps Website



Source: IRCICA e-library (<https://library.ircica.org/>)

7. Benchmarking

By comparing the destinations to others with similar characteristics in some aspects, benchmarking serves to understand the present situation of a business activity, its processes and management. The ultimate aim of benchmarking is to describe the paths for the business activity in question to reach the ideal improvement levels observed in best practices. Benchmarking, as a technical procedure, is accepted to drive “knowledge sharing” and “motivational process”²⁷¹. Benchmarking has long been practiced for a number of examples in various business (sectoral) fields from manufacturing to services sector to improve their processes or products by taking into account the standards and the actions, which are adopted in the best practices. Concrete results and conclusions obtained from benchmarking can reveal the need for long term plans to achieve and go beyond the standards and achievements in the best practices.

²⁷¹ Wöber, 2001

A benchmarking study can be conducted by using internal and external examples to compare the characteristics of a business or location. Internal benchmarking compares the subdivisions of the same organisation or location according to some standards and characteristics. In external benchmarking, organisations or locations are compared with their counterparts elsewhere which are sometimes competitors in the same sector (competitive benchmarking); or which are not in competition but seen as the best-practices (best practice benchmarking); or which are representatives of a certain sector (sector benchmarking)²⁷².

Applications of benchmarking in tourism sector have been utilised for nearly three decades concentrating mainly on tourism businesses (accommodation, food & beverages etc.), non-profit tourism organisations and destinations in a country, region or smaller scale areas. When this method is employed in tourism sector specifically for a destination, it is generally focused on the total success of various tourism organizations, institutions as well as activities and processes in the destination by comparing them with their counterparts to improve performance and increase organizational learning. Searching best practices or examples is the first stage of the method. At the following stages, similar aspects of the best practices are evaluated to take lessons and gain insights from the activities conducted.

Following this approach, after studying destinations having similar quantitative and qualitative characteristics with Al Quds, three destinations are evaluated to learn from their experience and have insight from their practices and the way of dealing with challenges and conflicts similar to those Al Quds faces today. Additional consequences are also presented for the structure, uniqueness and exemplary features of destination management organization in the studied destinations.

From this point of view, three important destinations bearing similar features, to some extent, with Al Quds are selected by analysing their qualitative and quantitative characteristics in accordance with the components of widely – known PES analysis for each case. In addition, common characteristics of these destinations compatible with Al Quds are highlighted by giving some details of the good practices applied in the destination cases. Destinations selected are as follows.

1. Shri Badarinath Dhaam (Pilgrimage Destination on the Route of Char Dhaam Yatra) India,
2. Sri Pada (Adam's Peak) in Sri Lanka
3. Santiago de Compostela (Old Town) in Spain.

Details of the PEST analysis applied for the selected destinations to clarify their present situation, future prospects and good practices to inspire opinions for Al Quds are given in

Table 17. In the following sections, the destinations are evaluated in detail to gain foresights for the project area.

²⁷² Ibid.

Table 17 Details of PEST analysis applied to selected destinations

POLITIC	ECONOMIC	SOCIAL	TECHNICAL/ TECHNOLOGICAL
Geographical and political location	Touristic assets ¹	Structure of communities	Condition of tourism infrastructure
Political borders	Sectoral share of tourism ²	Ethnic, religious and cultural diversity ⁵	Accommodation services
Political recognition	Main tourism statistics ³	Quality of social and human capital ⁶	Facilities and activities ⁷
Ruling	Future Prospects	Awareness and preparedness of locals for tourism	Local transport services
Prolonged political conflicts and challenges	Adopted tourism policies (visions)	Good examples	Hospitality and customer care ⁸
Political difficulties for visitors	Concrete strategic targets and action plans		Airport services
Solutions and good examples	Good examples of applications (to be) implemented		Prices
Environment sensitive applications	Legal status and tourism institutions of destinations ⁴		Smart technologies / artificial intelligence
			Promotion and marketing techniques
			Sample applications

¹Natural, cultural, religious and historical heritages (to be) used as tourism values like itineraries, trails, pilgrimage sites etc.)

²Place of tourism among the sectors to the aspects of GDP and employment for years

³Number of foreign and domestic visitors, overnights, tourist's receipts (revenue) and its rate in GDP over years

⁴As state, region or city having legal entity like ministry, tourism board, DMO or private sector associations

⁵Keen rivalry or conflicts between the groups with different ethnicity or religion

⁶Population dynamics, urban – rural population, age and sex distribution, literacy, language communication

⁷Food and beverages, local events, festivals etc.

⁸Service quality, quality of tourism staff including guides, tour operators, hygiene, sanitation and cleanliness

7.1. Shri Badarinath Dhaam (Pilgrimage Destination on the Route of Char Dhaam Yatra)

7.1.1. Political Condition

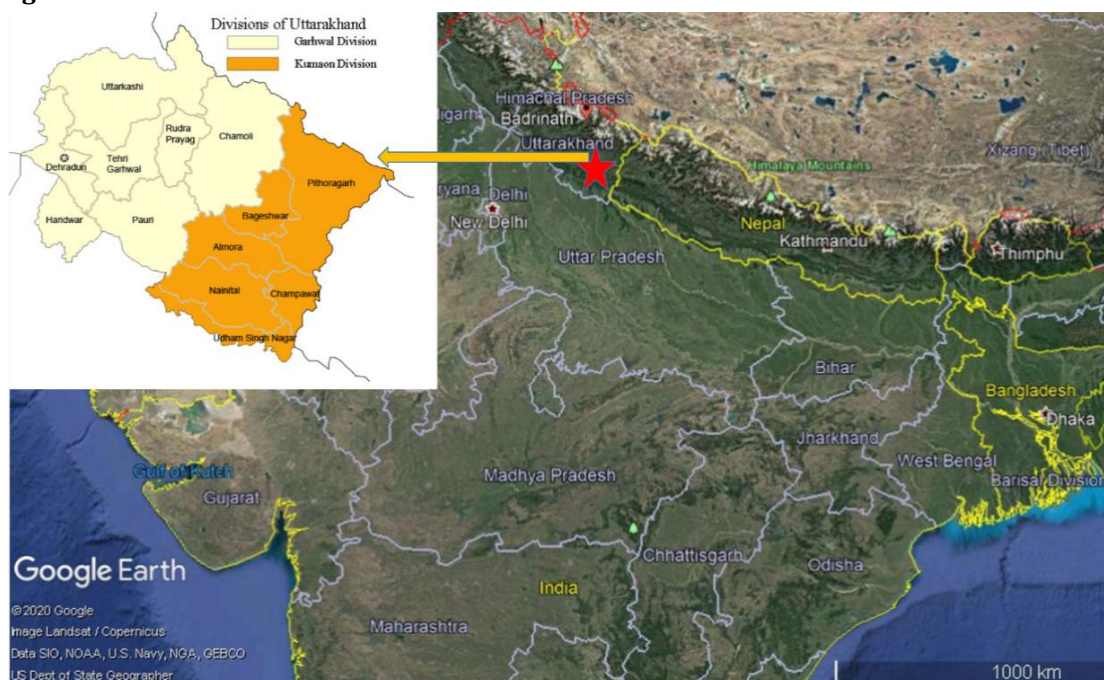
Shri Badarinath Dhaam is located in the mountainous Garhwal Region in the official boundary of Uttarakhand State lying in the northwest of India (Figure 30) Uttarakhand is one of these 28 states in India. Uttarakhand state is surrounded by the country borders of Tibet and Nepal covers an elevated topography at the outskirts of Himalayas. Surface area of Uttarakhand state is 53,483 sq. km and about 86% of the area is mountainous and 70% is covered by forest.

Uttarakhand was established in November 2000 by separation from another state in India, Uttar Pradesh. After India gained its independence, the state Tehri, which was composed of the Garhwal and Kumaon divisions and present in the place of Uttarakhand at that time, joined today's Uttar Pradesh state. It was until 1998 that various political groups began to defend the

separation of Uttarakhand from Uttar Pradesh. After a long political discussion and conflicting period including public movements, street demonstrations and fights, in 2000, Uttarakhand was established as a distinct state from Uttar Pradesh.

Uttarakhand is ruled by its own dynamics as 27th state under the union of India having rights to citizenships and serving all the civil rights to its civilians officially.

Figure 30 Location of Char Dhaam Yatra



Source: prepared with the image from https://en.wikipedia.org/wiki/Administrative_divisions_of_Uttarakhand

7.1.2. Economic Situation

Since its establishment, the state of Uttarakhand is reported to have grown the fastest among other Indian states by attracting public and private investments in especially manufacturing, tourism and infrastructure due to its advantages e.g., physical proximity and accessibility to the significant production, administration and trade centres (Dehradun city and Pant Nagar airports). The economy of Uttarakhand state is based largely on the services sector which totally relies on tourism – related activities. Services / tourism sector accounts for more than 50% of the State's GDP²⁷³ in Uttarakhand. In this respect, tourism is among the largest contributors of socioeconomic development in convenience with the green growth vision of the State. Other than services sector and tourism, the State harbours also small scale industries processing minerals, energy, fruit production and forestry.

273 SGA, 2018.

The State is rich in natural and cultural resources serving for tourism sector as assets especially water and dense forests with many glaciers and rivers and religious shrines. Such assets make the State a destination suitable for adventure, leisure, ecotourism and pilgrimage. Main tourism themes in the State are adventure; pilgrimage, cultural and festivals; wildlife, bird sanctuaries; nature and landscape; health, rejuvenation and spiritual; eco rural tourism; water sports; MICE; Buddhism heritage; ropeways and funicular²⁷⁴.

Based on the similarities with Al Quds, the State shelters a very important pilgrimage route of four settlements where sacred shrines were built in the past and turned out to be holy places to visit. Among the most important sacred routes in the State are four locations, Badrinath, Yamunotri, Gangotri, Kedarnath, which are forefront and can be a comparative case for Al Quds.

Shri Badarinath Dhaam, founded at an elevation of 3133 m is the complementary part of a pilgrimage trail / route covering three additional sacred temples/shrines, which are Yamunotri Dhaam at 3293 m; Gangotri Dhaam at 3200 m and Shri Kedarnath Dhaam at 3581 m. This holy trail harbouring natural beauties and possibilities for adventure activities in addition to its pilgrimage characteristics is called Char Dhaam Yatra²⁷⁵. This route is accepted to be sacred for Hindus because each of the four points on the Char Dhaam Yatra is believed to be devoted to holy Gods and rivers in Hinduism. The shrines of Gangotri, Yamunotri, Badrinath and Kedarnath are built in the names of the River Yamuna, River Ganges, Lord Vishnu and Lord Shiva, respectively. This route shelters four of the most attractive pilgrimage points for Hindus in and out of India due to their sanctity which must be visited at least once in every Hindu's life to be freed from the sins (Figure 31).

The number of domestic (from other parts of India) and foreign tourists coming to the State is given in Table 18^{276,277,278}. Even though in terms of foreign visitors, Uttarakhand state is among the least attractive states in India with less than one percent, total number of tourists coming to Uttarakhand has continuously increased over especially in recent years from about 20 million in 2013 to nearly 37 million in 2018 with an estimated yearly increase of 7%²⁷⁹.

²⁷⁴ Ibid.

²⁷⁵ Uttarakhand Char Dham Devasthanam Board, 2020a.

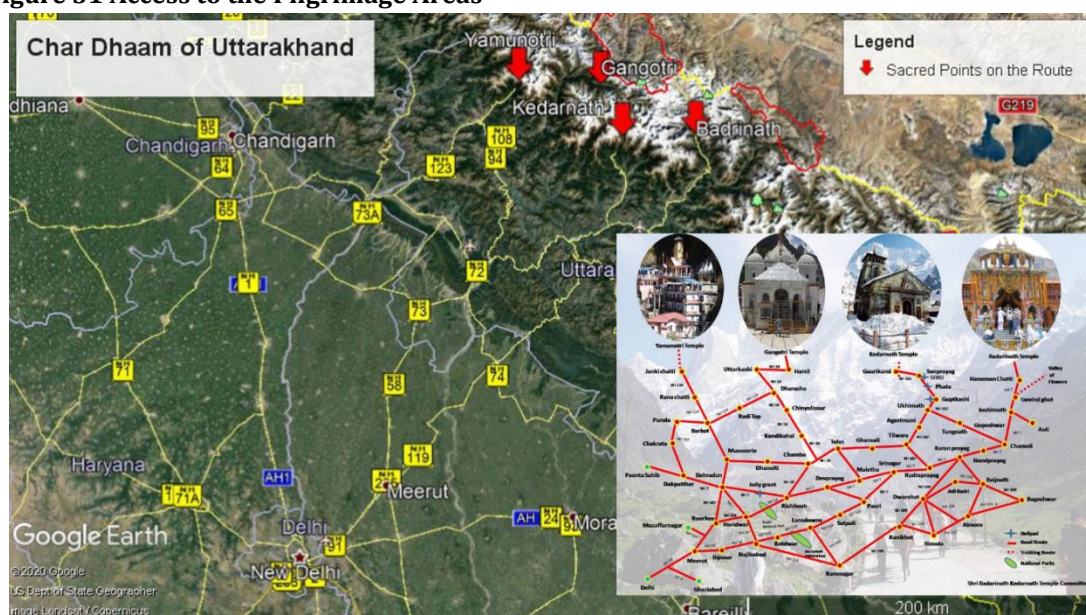
²⁷⁶ Invest India, 2020.

²⁷⁷ SGA, 2018.

²⁷⁸ DESUK, 2019.

²⁷⁹ SGA, 2018.

Figure 31 Access to the Pilgrimage Areas



Source: prepared with the image from Uttarakhan Char Dham Devasthanam Board (2020b)

Foreign tourists' purposes of visit are reported to be 58.2% for holiday/sightseeing, 21.9 % for health/yoga and 19.4% for pilgrimage/religious functions and about 52.1% of tourists are attracted by spiritual centres. Domestic tourists' purposes of visits are pilgrimage/religious by 44.2% and 43.6% holiday/sightseeing²⁸⁰.

Table 18 Tourist Arrivals in Uttarakhand (millions)

Year	Domestic	Foreign	Total
2010	30,97	0,136	31,106
2011	26,67	0,143	26,813
2012	28,29	0,125	28,415
2013	19,94	0,097	20,037
2014	21,99	0,102	22,092

Year	Domestic	Foreign	Total
2015	29,374	0,111	29,485
2016	31,664	0,113	31,777
2017	34,581	0,142	34,723
2018	36,698	0,155	36,852

Source: Ministry of Tourism, Government of India (2019)

Among the businesses in the Uttarakhand's tourism value chain, registered number of accommodation facilities and tour operators at both national and state level is given in

Table 19 and Table 20. Based on the tourist arrivals and the distribution of accommodation types (i.e. small rate of 4 or 5 star hotels) it seems that there is an insufficiency in the quantity and quality of accommodation facilities. On the other hand, totally 5 tour operators serve in the state four of which are adventure based and one inbound due to type of tourism prevalent in the state.

280 Ibid.

Table 19 Type, Number and Share of the Accommodation Facilities in Uttarakhand State

Type and Number ²⁸¹		5-Star Deluxe	5-Star	4-Star	3-Star	2-Star	1-Star	Apartment Hotel	Time Share Resorts	Heritage Hotels	B&B Establishment	Guest House	Total
Uttarakhand	Hotels	1	-	-	2	-	-	-	-	-	50	-	53
	Rooms	135	-	-	124	-	-	-	-	-	250	-	509
India (total)	Hotels	153	162	258	488	43	8	0	0	46	621	5	1,784
	Rooms	34,444	19,431	13,224	18,166	1,015	286	0	0	1,403	3,140	88	91,197
Share of Uttarakhand (%)	Hotels	0.65	-	-	0.41	-	-	-	-	-	8.05	-	2.97
	Rooms	0.39	-	-	0.68	-	-	-	-	-	7.96	-	0.56
Facility ²⁸²	Tourist Rest Houses		Night shelters		Hotels and guest houses			Dhramshala					
No.	176		33										
Bed No.	6164		1590		5619			895					

Source: Ministry of Tourism, Government of India (2019)

Table 20 Number and ratio of registered tour operators in Uttarakhand state

State ²⁸³	Adventure Tour Operator	Domestic Tour Operator	Inbound Tour Operator	Travel Agent	Tourist Transport Operator	Total
Uttarakhand	4	0	1	0	0	5
Country's Total	50	140	485	215	109	999
%	8,0	0,0	0,2	0,0	0,0	0,5

Source: Ministry of Tourism, Government of India (2019)

Due to the insufficient accommodation facilities, Uttarakhand Tourism Development Board (UTDB) and local government try to develop homestay by encouraging and giving incentives to local people to open their houses to tourists.

The State has a strategic tourism development policy document prepared by local government first in 2001 and updated it in certain intervals. As a result of this strategy, tourism development board was established functioning as a destination management office, including the representatives of public (2 directors) and private sector (5 board members) to advise local government in tourism related matters. In addition, the board has regulatory and licensing authority over the private sector in tourism value chain. In the tourism development strategy of

²⁸¹Ministry of Tourism, Government of India, 2019.

²⁸² DESUK, 2019.

²⁸³ Ministry of Tourism, Government of India, 2019.

the State, priorities are the investment attraction and land allocation to tourism investments in the potential tourism areas and sustaining the development in the predetermined tourism products and themes.

In the future prospects of the State for tourism, some examples may also fit Al Quds, which are film (making) tourism, a practice of service apartments (hired by tourism professionals from owners and rented for tourists' stay), homestays, "discover your roots" program (to give visitors clues about their spiritual/religious roots), ropeways (in possible areas). In the institutional framework, in addition to tourism development board, some new mechanisms are established like a committee with high powered authority on the regulation of private sector projects by prioritizing them and finding incentives and lands. Another practice targeting private sector is the "ease of doing business and single window clearance" which enables tourism investors and professionals to monitor legal framework, access all official information to obtain required official documents about investment, find suitable land and apply and complete official procedures through a single window of a website.

As the capacity building practices, other than large projects, tourism SMEs are financially supported in every section of the tourism value chain from accommodation facilities to parking lots. Assessment of training needs among different tourism service providers like drivers, cooks, guides, hotel staff etc. is another priority of the tourism strategy of the State. In addition, Tourism Development Board of the State demands private sector to work with certified staff to improve service quality. In line with the tourism strategy, some practices are implemented for the private sector. Based on the services they provide, accommodation facilities are voluntarily categorised in a wide range of scale like gold, silver etc. by an authority. In order to promote entrepreneurship among the youth in certain professions like being heritage guide, cook etc. a program is designed.

Aggressive marketing and branding activities, roadshows, familiarity trips and info tours are also practised in the State. Remote access of tourists to the destination through new technologies is also another practice. Cleanliness of the most demanded tourist points is provided by voluntary student groups and CBOs.

Out of the State, Central Government of India gives great emphasis on developing pilgrimage tourism by implementing projects on various themes based on previously prepared policies and strategies like PRASHAD, a Scheme "National Mission on Pilgrimage Rejuvenation and Spiritual Augmentation Drive" prepared in 2014-15 by the Ministry of Tourism of India to complete infrastructure of significant sacred pilgrimage areas by targeting to improve domestic tourism including the Development of Infrastructure for Pilgrimage Facilitation in Badrinath, Uttarakhand. Central Government of India also prepared a road map to develop infrastructure in the areas with pilgrimage potentials by leaving a considerable amount of budget for financing the projects with this aim²⁸⁴.

284 Invest India, 2020.

7.1.3. Social Structure

Population of Uttarakhand is 10.086 million 70% of which is rural and 51% is male. From the religious prespective, 83.6% of the population is Hindus, 14% Muslims, 2% Sikh²⁸⁵. Literacy among the state's population (78%) is reported to be higher than the country average which results in quality labour force and attraction of investments for several sectors including industry and tourism. The state ranks 19th in terms of area coverage and 20th in terms of population in the country.

The root of Uttarakhand goes back to historic Garhwal and Kumaon regions rivals to each other under the cultural and language effects of their neighbour states inhabited by different nations. However, some obligatory factors like the geography they live, economic conditions, cultural characteristics they share and traditions make the regions live together. This situation formed the new political identity of Uttarakhand²⁸⁶.

7.1.4. Technical/Technological Infrastructure

One of touristic attractions in the State comes from four most significant structures (shrines/temples) in the high sacred mountains from Hinduism perspective as well as potentials for other tourism types like nature and adventure. Char Dhaam Yatra route starts from Haridwar which is accessible from New Delhi and other big settlements via every type of vehicles and visitors can go to each of the four sacred points through highway up to a point and then they either walk or ride a horse. The most preferred transport type is air maintained over Delhi very intensively. In addition, the number of registered private sector facilities (like hotels) and professionals (like tour operators) seems to be not sufficient.

7.1.5. Organization of Destination Management in Uttarakhand State

Since the tourism sector has an important share among the economic activities of Uttarakhand state, Local Government has assigned one of the State Departments (ministry) to the tourism sector (State Department of Tourism). The Department incorporates a higher administrative, consulting and executive body, Uttarakhand Tourism Development Board (UTDB), to handle issues related to tourism and make recommendations directly to the Local Government on all the tourism-related matters. This body resembles a destination management organization (DMO) working like a regional development agency as far as her role and supports are concerned. Minister of Tourism is the head of the Board and Chief Secretary of the State is the vice-chairperson. Secretary of Tourism Ministry is the Chief Executive Officer (secretary-general of the board). In addition to officials, the board has five members who are tourism professionals and specialists. It has offices in all districts (provinces) of the State. In addition to its functions as a regulatory and licensing authority, it has also predefined roles, responsibilities and duties mandated by official documents and strategies requiring the allotment of a budget based on fees

285 DESUK, 2019.

286 Aggarwal, Agrawal, and Gupta, 1995.

and taxes. The web portal of the Tourism Department is the website of the Uttarakhand Tourism Development Board (www.uttarakhandtourism.gov.in) and it is the main access point for all parties related to tourism from tourists to beneficiaries of tourism incentives.

The Board also functions as a regulatory and licensing authority. It has predetermined vision, missions and roles written in a well – prepared tourism development strategy constructed with a participatory approach. The Board seems to position itself as a junction point for official, tourists, locals and local tourism business owners. The Board has a holistic and multifunctional web site serving for;

- promoting and marketing of the State as a destination,
- links to also social media accounts,
- information on 32 tour packages in 67 sub – destinations involving 8 tourism products offered to tourists,
- enabling visitors to find accommodation and travel agencies and make booking,
- presenting homestay and tour guide possibilities,
- allowing local tourism entrepreneurs to register for serving in the tourism sector by opening their homes to tourists, establishing a travel trade business, or investing in the area.
- access to tourism research, development strategy and other related documents like statistics to users.

The board is given the responsibility to;

- prepare tourism inventory and road maps to develop tourism resources, new tourism products and events and also destinations,
- prepare the standard operation procedures (SOP) for tourism businesses in the business areas like wellness centers, hotels, food etc. as well as guidelines and rules for the regulation and safety measures for some tourism types like adventure and nature tourism activities,
- select and recommend locations for tourism facilities or development of zone for sectors like the film industry, cultural festivals, health, rejuvenation & spiritual tourism etc.,
- promote all the destinations and facilities in their area by preparing an online catalogue of destinations,
- improving internet and mobile phone connections to increase the accessibility of all destinations in the State,
- work for marketing & branding of the destinations using ICT and purchasing promotion and advisory services from professionals to implement aggressive branding and marketing policy is adopted in the State to boost tourist inflow,
- acting as a development agency to give financial supports, incentives and subsidiaries to local entrepreneurs, businesses and new tourism investors as well as promoting supports which results in increased employment in the tourism sector,
- work with other departments and boards closely or remotely related to tourism,
- improve the Ease of Doing Business in the Tourism sector in Uttarakhand for the private sector by providing clearances in a short time through the Single Window System,

- conduct training for tourism entrepreneurs and professionals to build and increase their capacity in the themes like local guides, welcoming, cooking, house-keeping, F&B, language etc.,
- give refreshment and certification courses for tourism employees.

UTDB implements a unique financial support/development program open to all sides of the tourism sector in the State. UTDB's support mechanism can be classified into two categories. In the first category which is designed as financial support program for tourism projects submitted by the private sector and non-profit organizations. The projects are evaluated by the, High Powered Empowered Committee (HPEC). HPEC, which is above the UTDB and composed of nine high – level officials including the CEO of the UTDB and its two members, is authorized to select eligible projects to be supported and implemented. UTDB can also propose projects directly to the Committee to be implemented. The second support of the UTDB to tourism sector is related to the potential tourism investors or entrepreneurs. In the scope of this support mechanism, UTDB functions as investment support office for potential tourism investors and entrepreneurs to dispatch public incentives or subsidies. UTDB assists candidate tourism investors and entrepreneurs to register in the Single Window Clearance System, which is an application portal for private sector to register and receive public incentives and financial supports. UTDB's assistance to tourism investors and entrepreneurs saves time and simplifies procedures. In addition, the System enables all possible investors to see possible investment fields and areas. UTDB has also its own online registration system with similar structure and access to the Single Window Clearance System. Application procedures can also be completed for all types of tourism incentives, supports and subsidies through the UTDB's registration system and this system is matched with the Single Window Clearance System.

7.2. Sri Pada

The Sri Pada may exhibit the best possible features that match Al Quds as a pioneering example for its pilgrimage characteristics.

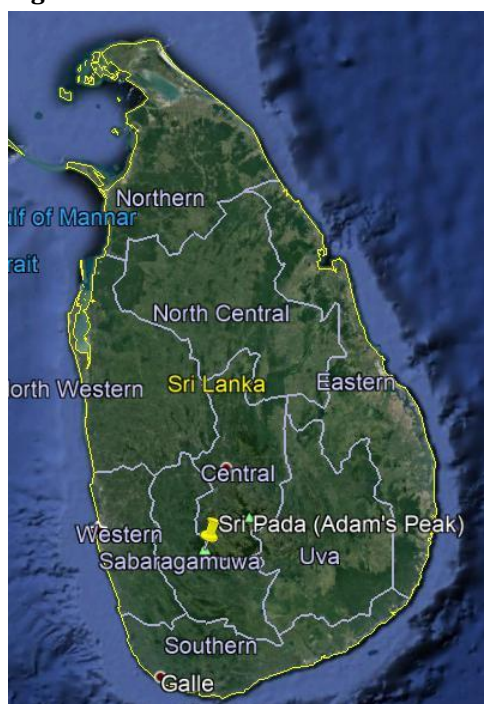
7.2.1. Political Condition

The Sri Pada tourism destination is a high mountain (2243m) surrounded by dense forest inhabited by wild animals and diverse plant species in the Central Province (6°48'33"N; 80°29', 59"E), one of nine provinces (first-degree territorial units) of Sri Lanka, an island country formerly known as Ceylon in South Asia (Figure 32). The surface area of Sri Lanka is 65,610 square kilometres.

In UNESCO's World Heritage Tentative List, the mountain is included in "Ancient pilgrim route along the Mahaweli River in Sri Lanka" from Seruwila (eastern part) to Sri Pada (central part)²⁸⁷.

287 UNESCO, 2010.

Figure 32 Location of Sri Pada



Source: magnified from Google Earth

7.2.2. Economic Situation

Sri Pada is a very important pilgrimage destination accepted by the followers of Buddhism, Hinduism, Christianity and Islam to be sacred because of the belief in all these religions that a 1.8 m-long rock formation “sacred footprint” close to the peak belongs to Lord Buddha’s left foot, Lord Siva, St. Thomas (introducing Christianity to the area) and the prophet Adam upon touching on the earth²⁸⁸. Throughout history, Sri Pada has carried on its religious and holy characteristics which became tourism assets today.

Basic economic indicators of the country presented in Table 21 show that GDP per capita (USD) and the share of the services sector including tourism in the composition of GDP (%) increased from 2016 to 2018 and tourism gains an important place²⁸⁹.

Table 21 Basic economic indicators

	GDP (USD)	Sectoral Composition of GDP (%)			Unemployment (%)
	Per Capita	Agriculture	Industry	Services	
2016	3,886	7.1	26.5	56.7	4.4
2017	4,104	6.9	26.7	56.8	4.2
2018	4,102	7.0	26.1	57.7	4.4

Source: Central Bank of Sri Lanka (2019)

288 Ibid.

289 Central Bank of Sri Lanka, 2019.

The share of tourism related sectors (e.g., accommodation – food and trade) in employment given in Table 22 shows the increase across the country. In addition, employment shifts to private sector and self-employment at a significant and increasing rate in the country. For the contribution of the country's provinces to the GDP, Central Province's contribution in services sector is the second highest showing the effect of tourism sector²⁹⁰.

Table 22 Shares of economic activities in employment

Shares in employment (%)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Agriculture	32.6	32.7	33.1	31.2						
Manufacturing	17.7	17.1	16.7	17.5						
Construction	7.4	7.1	7.2	8.4						
Trade & Hotels	14.7	15.5	15.1	15.6						
Accommodation and Food Services Activities					2.2	2.4	2.6	2.6	2.6	3.0
Financial and Insurance Activities					1.8	1.9	1.8	2.0	1.9	2.2
Transport, Storage & Communication	5.9	6.3	6.2	6.5						
Insurance & Real Estate	3.0	3.4	3.5	3.5						
Personal Services	18.8	17.9	18.2	17.4						
Education					3.9	4.1	4.1	4.3	4.6	5.3
Human Health and Social Work Activities					1.7	1.6	1.8	1.8	1.8	1.8
Other(s)					4.3	5.0	4.9	5.0	4.2	4.6

Source: Central Bank of Sri Lanka (2019).

Tourism is the third-largest sector to support the country's exchange reserves following workers abroad and textile sector²⁹¹. Table 23 gives general information about status of tourism in the country in 2019. It is noteworthy that length of stay is better than that of several destinations in the world and main markets sending tourist are European countries.

Table 23 Summary of updated tourism data (2019)

Number of foreign visitors	1,913,702
Annual revenue	USD 3606.9 million
Share of tourism in GDP	4.3%
Mean daily tourist expense	USD 181.2
Average of overnight stays per tourist	10.4 nights
Overnights total	19,902,501
Occupancy of accommodation facilities	57.09%
Total employment	402,607
Direct employment	173,592
Indirect employment	229,015
Top 5 countries sending tourists	India, United Kingdom, China, Germany, France

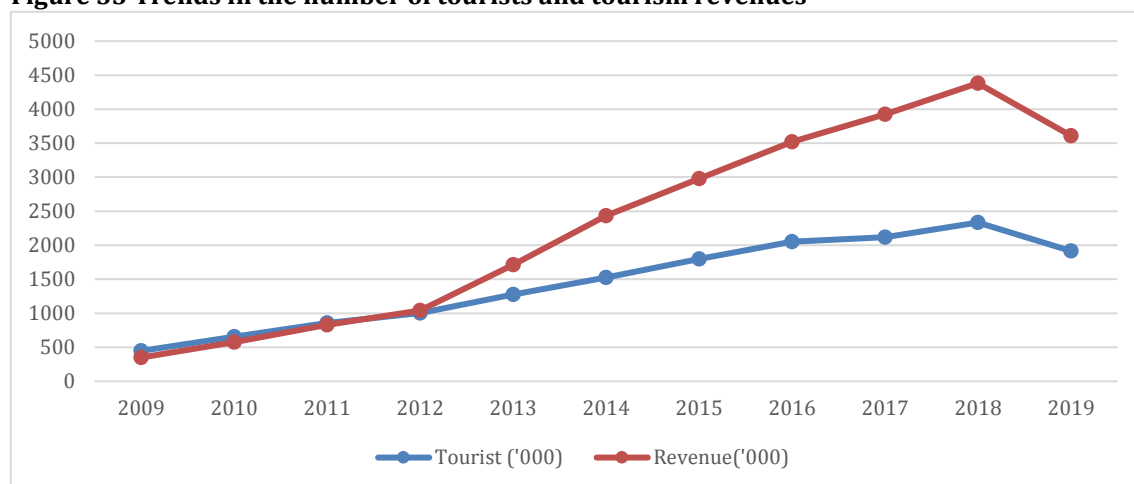
Source: SLTDA (2019)

²⁹⁰ Ibid.

²⁹¹ SLTDA, 2019.

It is seen from Figure 33 that number of tourists and tourism revenues have consistently increased over the last years until 2019 when 18.0% and 13.6% decrease was experienced in number of tourists and receipts, respectively.

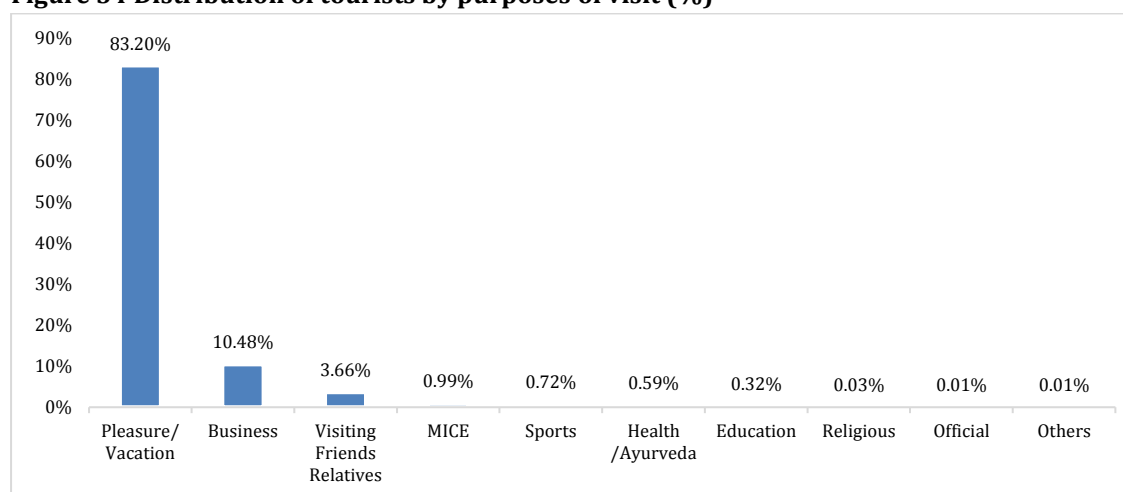
Figure 33 Trends in the number of tourists and tourism revenues



Source: SLTDA (2019)

As for the purposes of visit, pleasure/vacation has the largest share while the share of religious purposes is very little (0.03%; Figure 34). However, the tourists coming for pleasure/vacation also visit religious places.

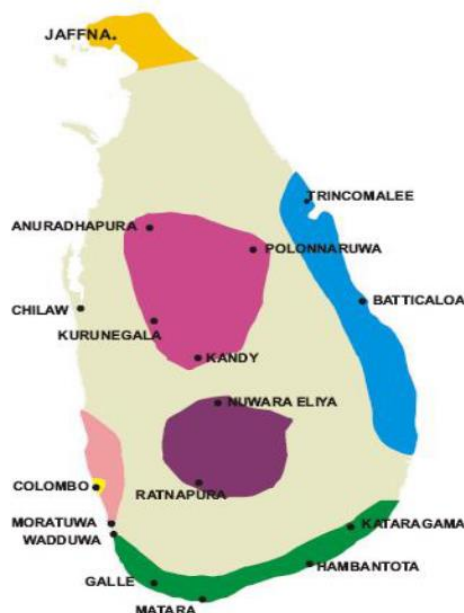
Figure 34 Distribution of tourists by purposes of visit (%)



Source: by author own based on SLTDA (2019)

Occupancy rates of the country's touristic regions are given in Figure 35, where the Hill Country region sheltering Sri Pada reflects the fourth and third largest accommodation rates in 2018 and 2019, respectively.

Figure 35 Occupancy rate of accommodation



Resort Region	Occupancy Rate	
	2018	2019
Colombo City	79.2%	54.1 %
Greater Colombo	75.4%	58.2 %
South Coast	73.1%	62.1 %
East Coast	71.4%	61.1 %
Hill Country	71.7%	58.9 %
Ancient Cities	71.4%	57.3 %
Northern Region	68.5%	47.7 %

Source: SLTDA (2019)

Tourism is one of the most important economic sectors in the country and its potential of job creation is recognized officially. The number of visitors and tourism revenues have increased consistently. During the civil war lasting over years, which ceased in 2009, the country was seen to be unsafe and the sector could not offer any products to its clients. Over the years, due to the limited tourism possibilities and low prices, the country did not receive investment for tourism. Tourism professionals and workers preferred to go abroad. Since 2009 a rapid development in the sector has been witnessed; however, the lack of planned tourism development caused lower revenues and waste of resources. In order to sustain the growth in the tourism sector by increasing revenues, protecting tourism values, accessing additional markets and including local people in the sector, official tourism authorities mainly the Ministry of Tourism started to implement strategies²⁹². Main targets of the strategies involve a transformation in the sector which includes governance (redesigning responsible authorities for tourism), improving the experience and pleasure of tourists, changing marketing and local participation approach, considering sustainability, increasing the service quality and including community in the sector as entrepreneurs and workers.

Officially responsible tourism authorities are diverse in the country and there are four different tourism entities under the rule of Ministry of Tourism Development and Christian Affairs. These institutions are Sri Lanka Tourism Development Authority (SLTDA), Sri Lanka Tourism Promotion Bureau (SLTPB), Sri Lanka Convention Bureau (SLCB), and Sri Lanka Institute for Tourism and Hotel Management (SLITHM). The government proposed to coordinate these

²⁹² SLMTDCRA, (2017).

institutions closely and established a tourism board called “National Tourism Industry Council”, members and directors of which are composed of private sector representatives. Another strategy of the government is to monitor visitors through research and data collection to provide high quality services and access to new markets. Marketing and promotion actions are proposed to be implemented through new technologies and digital media. Destinations are proposed to be planned by considering sustainability. Service quality in all sections of the value chain from accommodation to tours and retails are targeted to be improved. The final point of the strategy was to increase the inclusion of locals in tourism sector as workers, managers, entrepreneurs etc. by giving them training, informative presentations and applications.

7.2.3. Social Structure

The population of the country was 21.670 million in mid – 2018 which increased consistently over the last 10 years^{293,294}. Population density is 346 people across the country and 493 in the Sri Pada’s region²⁹⁵. Life expectancy in the country is 75.5 years (2017) on the average and literacy rate is 93.6 and 91.7% (2017) on the average among men and women, respectively.

When the distribution of Sri Lanka’s population for ethnicity, religion and other features is considered, it is seen that the majority of the people living in the country are Sinhalese (74.9%), Buddhist (70.1%), in the 15 – 59 age group (62.4%) and live in rural areas (77.4%). In terms of ethnicity, Tamils are the second highest population in Sri Lanka and divided into two groups, Sri Lankan Tamil (inhabiting the island for millennia 11.2%) and Indian Tamil (coming from India as agricultural workers; 4.1%). The religion with the second-highest number of devotees is Hinduism (12.6%) followed by Islam (9.6%) and Christianity (7.6%). Buddhism is the most prevalent religion among the Sinhalese (the majority) while Tamils are Hindu and Islam and Christianity are seen among nearly all ethnic groups²⁹⁶.

It is important to note that based on the distribution of religions and ethnicities for districts, second-degree territorial units of the country, the areas surrounding the Sri Pada pilgrim destination, two districts, Nuwara Eliya and Ratnapura are densely populated areas and Hindu and Sri Lankan Tamils are dominant in Nuwara Eliya while in Ratnapura Buddhists and Sinhalese are overwhelmingly dominant. In addition, all the religions and ethnic groups in the country also live in the area.

In summary, Sri Lanka is an island country with unique natural reserves and human population from diversified religious and ethnic groups even though one of them is dominant. Economic activities (based on employment and foreign revenues) are based mainly on agriculture, industry and services sectors (tourism). Thanks to the developing tourism sector in recent years,

293 Central Bank of Sri Lanka, 2019.).

294 World Bank, 2020d.

295 Central Bank of Sri Lanka, 2019.

296 Samarasinghe, (2012, 345-364.

the share of the services sector has been increasing considerably in the overall employment and national GDP.

Sri Pada may play an exemplary role for Al Quds because it is a destination with a very high religious importance for the followers of four religions based on various narrations of significant religious figures. The regions surrounding the area inhabit population from several religions and ethnic groups. Under such circumstances, the area is visited by tourists for several reasons like pilgrimage, natural sightseeing in a secure way. Public administration invests in infrastructure and private sector makes investment in accommodation and other facilities to develop tourism and increase the number and receipts of tourists in the area.

7.2.4. Organization of Destination Management in Sri Pada and Sri Lanka

Tourism authority responsible in Sri Lanka is the Ministry of Tourism (the latest name is Ministry of Tourism and Aviation) with the objectives of establishing policy and regulatory framework which enables to implement, monitor and evaluate the tourism programs and projects, promoting the destination of Sri Lanka, and coordinating and registering the tourism agencies and related institutions. The ministry has four affiliated institutions, three of which function as destination management organization, namely, Sri Lanka Tourism Development Authority (SLTDA), Sri Lanka Tourism Promotion Bureau (SLTPB), and The Sri Lanka Institute of Tourism & Hotel Management (SLITHM).

Sri Lanka Tourism Development Authority (SLTDA) is the formal part of the ministry of tourism responsible for developing the tourism sector in the country. SLTDA took the place of Ceylon Tourist Board / Sri Lanka Tourist Board / Sri Lanka Tourism Board in 2007, which had served for a long time since 1966. The functions of the former tourism board were distributed among the newly established four boards.

Sri Lanka Tourism Development Authority (SLTDA) has an executive board of nine members, four of whom are from the private sector. Departments of the Authority work on standards & quality assurance, resort management, information & communication technologies, tourism planning, development and investors relations, human resources, finance management, domestic tourism & community relations and research & international relations.

The Authority can support financially or fund mega and small tourism projects through various programs like expanding homestay, infrastructure development, training for various tourism values like accommodation, food etc. SLTDA has a department, Investor Relations Unit (IRU), serving potential tourism investors to facilitate, coordinate and accelerate the legal permissions and procedures using an online platform for approval. Specialist staff from various government agencies helps investors identify feasible projects, obtain information regarding potential investments, submit applications, and provide support in obtaining investment promotion privileges, trade licenses and other approvals requested for project clearance.

Promotion, marketing and branding activities are performed by another tourism institution of the Tourism Ministry, Sri Lanka Tourism Promotion Bureau (SLTPB), which is directed by a Chairman, Managing Director and a Board of Directors who are the representatives of non-profit tourism organizations like Tourist Hotels Association of Sri Lanka, Sri Lanka Association of Inbound Tour Operators, Association of Small and Medium Enterprises in Tourism etc.

SLTPB is authorized to carry out marketing, promotion and branding processes of Sri Lanka in convenience with the tourism development strategy as a destination in cooperation with other bodies of the Ministry and all the tourism actors. The Bureau runs an effective website offering very diverse options to clients and service providers (www.srilanka.travel) from all types of online reservation and booking to visa application as well as satisfactory information and promotion content.

Sri Lanka Convention Bureau works for the development of the destination on congress and incentive organizations to increase the quality and quantity of MICE events. The Bureau acts for the coordination and cooperation of event organizers, incentive supplying businesses and NGOs to promote the opportunities of making organizations in the country, to conduct all the events more professionally and target customer satisfaction. The Bureau's services range from promotion and collaboration with various sides like airlines to organization of events. The Bureau works through a website covering all the necessary content (www.meetinsrilanka.com).

The last affiliated institution of the Ministry is The Sri Lanka Institute of Tourism & Hotel Management (SLITHM), which was founded to deliver training to build human resources capacity in the hospitality and travel industry. It has widened its schools to every part of the country. The Institute plays important roles to meet the need of local and international accommodation facilities and other service providers for quality human resources from top and middle management positions to manpower through short courses.

7.3. Santiago de Compostela (Old Town)

Santiago de Compostela could be regarded as a good example for Al Quds due to its sacred features and functionality as a pilgrimage and religious importance.

7.3.1. Political Condition

A reputable sacred pilgrimage destination in the north-west of Spain, Santiago de Compostela (Old Town) is located in the province of A Coruña, Autonomous Community of Galicia (N42 52 50.736; W8 32 40.848; (Figure 36)²⁹⁷. The city is the capital of the Galicia Community, which is one of 17 autonomous communities in Spain and covers the Lugo, Ourense and Pontevedra provinces addition to A Coruña. The area extends over 29,575 square kilometres including the

²⁹⁷ UNESCO, 2020.

significant cities like A Coruña, Vigo, Ferrol and Pontevedra. Galicia is highly accessible to whole country and Europe thanks to the modern highway and railway road networks in addition to important ports (127) and airports (3 in A Coruña, Santiago and Vigo) of Europe established in the area.

The story of today's charming city and the pilgrimage route began at the beginning of the 9th century through a discovery of a light over an old Roman tomb then the religious Christians accepted the area where St. James the Greater, one of the apostles in Christianity lies in convenience with their beliefs. In a very short time the area transformed into a structured area surrounding the sacred tomb as a well-known pilgrimage area attracting a considerable number of visitors even at that time. Over time, several new structures were built for various uses, e.g., hospital, church and monasteries and the city expanded. The city was demolished completely in the years of Muslim – Christian wars and became a representative figure of the fight against Muslims which augmented its religious importance for the Christians. The city was renovated and reconstructed totally.

Today the city (Old Town of Santiago de Compostela) presents monumental historical landscapes and unique urban forms by sheltering structures belonging to several artistic eras, which make the city to be counted among the world's most beautiful urban areas. The city has both historical and religious characteristics with its glamorous atmosphere. The pilgrims who intend to see St. James's pilgrimage route walk through ancient routes as in the old days by seeing and using several holy and facility buildings (like church, hospital, houses etc.) present on the route²⁹⁸.

Figure 36 Location of the area



Source: magnified from Google Earth

²⁹⁸ Lucarno, (2016).

7.3.2. Economic Situation

As a community, Galicia's economic activities other than tourism are concentrated on industry i.e. metallurgy sector based on automotive and ship construction and renewable energies (wind, hydraulic and biomass); services sector i.e. growing business, trade, accommodation, IT, biotechnology (health sciences), R&D, design/fashion and logistics (free trade zone and industrial commercial and service estates and business parks) and agriculture i.e. timber and animal products. Business and industrial facilities are established as SMEs²⁹⁹.

Some socioeconomic indicators of Galicia are given in Table 24, where high GDP per capita and life expectancy are visible. The unemployment rate of 13.3% is lower than that of the country (15.3%) even though considerably higher than that of the EU (6.9%)³⁰⁰.

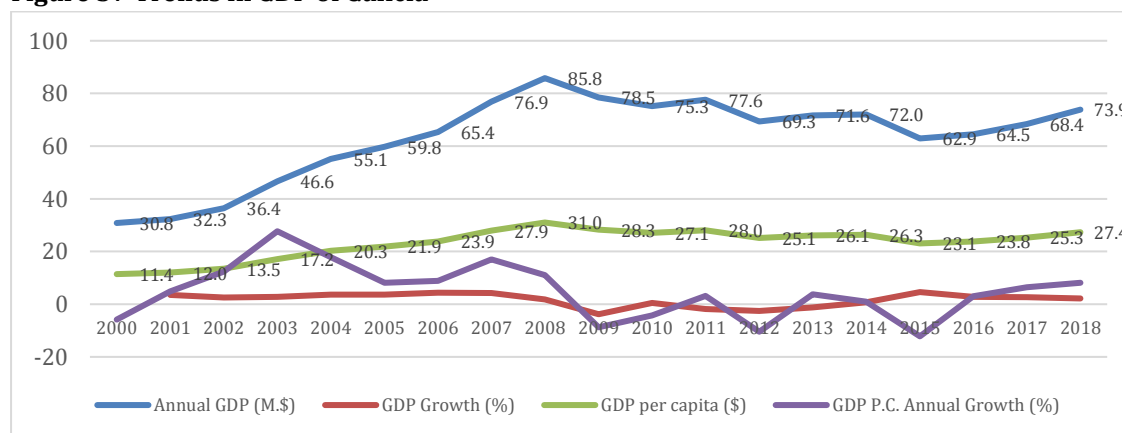
Table 24 Some indicators of Galicia

Parameters	Year	Value
Annual GDP	2018	USD 73.896 (million)
GDP per capita	2018	USD 27.364
Unemployment rate	2018	13,3%
Annual arrivals	2019	1.634.517
Life expectancy	2019	83,52

Source: *countryeconomy.com* (2020c)

From Figure 37, it is understood that both national GDP and GDP per capita have increased for a long term in Galicia. It may be concluded from the Spain's sectoral distribution of GDP that in Galicia GDP is composed mainly of services sector above 60% (67.87% across Spain in 2019), around 20% industry (20.2% in the country in 2019) and around 2-3% agriculture (2.65% in Spain in 2019)³⁰¹.

Figure 37 Trends in GDP of Galicia



Source: *countryeconomy.com* (2020c)

299 Countryeconomy.com, 2020a.

300 Xunta de Galicia, 2020.

301 Countryeconomy.com, 2020c.

In the Community, tourism has also grown consistently both in terms of arrivals and receipts in the last years. The reason for the increase in tourism figures is mainly the well – known “Camiño de Santiago” (Saint James’s Way). International tourist arrivals in Galicia are given in Table 25. As can be seen on the table, there has been a consistent increase in the number starting 2010 showing a breakthrough in 2013 and reaching 1,634,517 in 2019. Tourism in Galicia is reported to generate GDP, employment, capital investment, taxes and positive impacts on subsectors and tourism activities are responsible for 10.4% of total GDP of the Galician economy and 11% of employment³⁰².

Table 25 International tourist arrivals

2019	1.634.517	2013	871.041
2018	1.512.511	2012	861.338
2017	1.291.086	2011	851.561
2016	1.035.147	2010	688.773
2014	1.048.878		

Source: Statista (n.d.)

Galicia is among the tourist destinations of Spain attracting the greatest number of international and domestic tourists. Even though the tourism turned into an important sector in the Community later than other Communities in the country, it has grown faster in recent years. In this development, role of the region’s unique tourism potentials is very important due to the attractive characteristics of the sub-destinations such as the Way of St. James and Santiago de Compostela. The Community has completed infrastructure for tourism facilities e.g., accommodation, food and drinks facilities like hotels, hostels and guesthouses, campsites and rural tourism facilities. The region has the fourth highest number of hotels among the Communities in Spain following the Balearic Islands, Andalusia and Catalonia and is the seventh in Spain for the number of rooms.

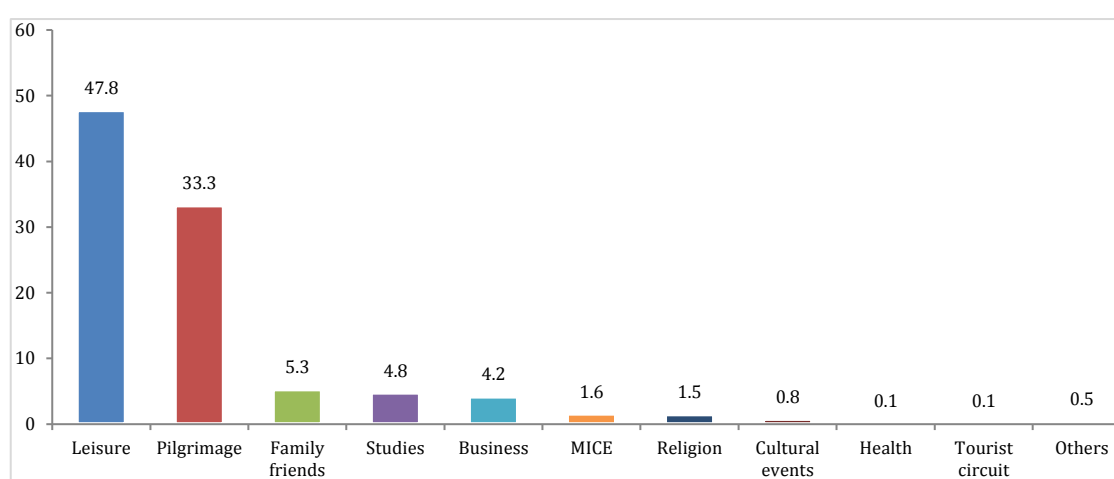
Apart from natural tourism potential, the combination of historic lands with Atlantic Ocean and the Cantabrian Sea, city walls are on the World Heritage Site list and in addition to the adventure based natural areas over water reserves and seaside (ports), Galicia shelters sacred points and routes like the Way of St. James. The Way of St. James has been attracting visitors from Europe and all over the world for a very long time for its distinguished sacred features which are accepted by some people to be spiritual and holy. Beginning from 9th century when the city was established, visitor pilgrims have desired to see the fascinating town Santiago de Compostela and cherished the memory of the apostle St. James it harbours. Over the years, visitors preferred different routes while coming to the town and thus having interactions with local people in the areas they pass by, gaining new insights and styles which were then transferred in to the holy

302 Statista, 2020.

town representing diverse cultural, technical and traditional traces. Central Government granted the route “Way of St. James” a distinct status in 1962 and in 1987 European Council declared a route to be cultural route for the first time. It is declared as Major European Cultural Route in July 2004. The route was included in UNESCO’s World Heritage List in 1993. The route “Way of St. James” offers many possibilities to visitors in the area and therefore more and more people decide to follow the route every year even on foot or by cycling.

Figure 38 shows the distribution of visitors’ aims to visit Santiago de Compostela in 2017. Among the purposes of visit to Santiago de Compostela, leisure and pilgrimage occupy the first two rows with rates of 48% and 33%, respectively³⁰³.

Figure 38 Distribution of tourists by purposes of visit (%)



Source: Diaz (2018)

7.3.3. Social Structure

Population of Galicia is nearly constant around 2,7million (5.8% of Spain) and mainly live in rural areas³⁰⁴. In terms of population, it is the fifth largest community of Spain (Table 26).

Table 26 Population of Galicia

Year	Female	Male	Total
2009	1,432,839	1,339,618	2,772,457
2010	1,432,604	1,340,811	2,773,415
2011	1,431,060	1,340,856	2,771,916
2012	1,426,006	1,335,964	2,761,970
2013	1,418,853	1,328,373	2,747,226
2014	1,412,641	1,322,014	2,734,656

Year	Female	Male	Total
2015	1,405,467	1,314,634	2,720,102
2016	1,400,681	1,309,447	2,710,129
2017	1,397,772	1,305,378	2,703,149
2018	1,396,988	1,303,453	2,700,441
2019	1,396,153	1,302,611	2,698,764

Source: Country economy (2020b), INE (2020)

303 Díaz, 2018.

304 INE, 2020.

In summary, the Way of St. James route and the city Santiago de Compostela with their deep historical and religious adventure offer visitors/pilgrims big variety of opportunities from cycling to cultural activities giving them great experiences. Even though the route and the city open the doors to tourism later than other Spanish regions tourism is heading to be the main sector in the region. The area is easy to reach from every part of Europe. Touristic facilities are serving efficiently. One-third of the visitors come to the area for pilgrimage and they have religious sensitivities. Community government takes tourism into consideration as the priority target sector.

7.3.4. Organization of Destination Management in Santiago de Compostela

Santiago de Compostela is the capital city of the Galicia region; therefore, the Galician Parliament undertakes its legislative and executive duties in the city as the authority for the autonomous region. The city has also its municipal parliament (city council as local government). Since 1978, Galicia has been an autonomous region governed by the President, Cabinet (Xunta de Galicia) and a Parliament elected every four years. Parliament has the power of legislation, execution and budget approval. The Xunta de Galicia is accountable to the Parliament and made up of the president, vice-presidents and regional ministers responsible for several administrative and socioeconomic sectors including tourism.

The city of Santiago de Compostela is governed by the Santiago City Council elected in every four years. The Council serves through its companies on very diverse social, economic and service areas from sewage to transport and the promotion of the city's tourism i.e. all the municipal and administrative works.

Santiago Tourism (Turismo de Santiago – INCOLSA) is a municipal company and professional body operating under the Santiago de Compostela City Council. It is responsible for developing and maintaining the city's tourism policy on the subjects like planning, managing, structuring, marketing and promotion and creation of tourism products. INCOLSA sets partnerships to implement the tourism development strategies with local and regional stakeholders like Ministry of the Economy, the Xunta de Galicia, Santiago City Council, Chamber of Commerce and Hotel and Restaurant Owners Associations in Santiago and the surrounding area. INCOLSA operates Tourist Information Offices serving in different languages in various parts of the city, supplies materials and brochures with tourists, offers products in souvenir shops and controls the tourism businesses by processing tourist complaints.

Santiago Tourism provides services also through its detailed and efficient website www.santiagoturismo.com. The website presents all the information and thematic promotion titles to potential visitors and all parties of tourism business. The website innovatively presents the city by targeting the masses like "Santiago for you", "Accessible Santiago", "Santiago for families", "Santiago for couples", "Religious destination" "Santiago for women" etc.

Santiago Tourism tries to expand tourism activities beyond those with religious aims by expressing it in development strategies. In this respect, congresses and incentive trips, gastronomy, studies (university), cinema and creativity are adopted to be developed in the city. Depending on the growth in film industry and production, the city efforts to get a share from this industry by setting up Santiago de Compostela Film Commission. In addition to attracting the film industry to the city, City Council targets congress tourism and for this aim, Santiago Tourism – INCOLSA established Santiago de Compostela Convention Bureau (SCCB) to make the city a destination for congress organizations. The website also offers information about the city and the route based on the themes like 1, 2 and 3 – day packages, routes on foot, film guide, shopping, going out at night and suitable activities for children.

In addition to studies, Galician Agency of Tourism (Galicia) with the motto of “the best way”, also serves for the development of tourism in the autonomous Galicia Region. The Agency functions regionally as a planning and promotion unit for tourism and has responsibility for developing regulations, collaborating and communicating with tourism-related bodies.

7.4. Results of the Benchmarking Analyses

Benchmarking shows that all three destinations have religious sites in common, they are successful in attracting a large number of tourists and creating a high amount of revenue. 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 their ethnic and religious diversity. All destinations have long term development strategies to implement projects.

After the evaluation of three destinations similar to Al Quds, there is a need to draw conclusion and make some recommendations. For this aim the methodology (detailing for PEST) explained earlier in this section is used to present conclusions systematically.

7.4.1. Politic

All three destinations are located at a specific geographical location along - with official borders either a province or a state. Contrary to Al Quds, none of the destinations face challenges resulting from political identity or official recognition.

All three destinations witnessed political conflicts and fights in the past or recent times. However, they succeeded solving these problems to a certain degree by either separating from the main state (Uttarakhand) or learning to live together (Sri Pada).

All example destinations work under an official body such as ministry of tourism. They have tourism NGOs, boards, and more than one official entities. In order to prevent the clash of authorities among responsible entities, some measures are taken to coordinate them. One of the best ways for it is that rather than the government, civil initiatives, especially the private sector,

are to be organized and act as a coordination body with the participation of all tourism stakeholders.

7.4.2. Economic

In all three destinations, tourism is among the main sectors and its share is increasing and contributing to GDP and employment, and attracting investment. Based on natural and cultural assets some infrastructure and value chain have already been constructed in the destinations. A planned tourism development effort is observed in all destinations. One of the most significant characteristics of the destinations is that they all shelter a long pilgrimage route where several sacred points, facilities and places are located to serve pilgrims and visitors.

All three destinations have a tourism development vision created by an authority with local participation. They also have very concrete and applicable strategies supported by several projects to be implemented on specific dates. Main strategies are built on the improvement of physical and social infrastructure e.g., improving service quality by increasing the quantity and quality of private sector facilities and human resources. Besides, marketing strategies are also effective since they try to use newly developed ICT technologies and aggressive promotion techniques. An interesting point in the Sri Pada example is that the Government aims to make an institutional regulation to combine or coordinate the responsibilities of four tourism authorities. Another important lesson from the examples, is that all destinations and their local and central government try to constitute or run a structure composed of either fully private sector or a mix of public, NGO and private sector to function as an advisory, regulatory and licensing body. Such a structure may have different names but they all function as destination management organisations. These institutions can assume the responsibility and authority for funding and monitoring tourism projects. In the destinations, additional efforts are made to include locals in the sector by encouraging homestays, entrepreneurship programs to start tourism businesses, training tourism professionals, workers and managers.

In addition to the above, it should be noted that in all routes and other areas used for other tourism types, environmental protection, responsible tourism principles and sustainable development goals are taken into consideration.

7.4.3. Social

Structure of the local community in the destinations is close to each other except for Galicia, Spain. Low and middle-income rural population is employed in the tourism sector since the destinations cover rural routes. Literacy and awareness level of locals are not so low. Responsible authorities try to include locals in the sector by providing some types of incentives and supports in special programs like homestay and tourism entrepreneurship for, especially women and youth. In and around the destinations, ethnic and religious diversity is high in especially Uttarakhand and Sri Pada. In the history of all three destinations, social and political separation practices were experienced which ended up in conflicts and sometimes short- and long-term civil wars. However, at the end, they have passed through a solution and

socioeconomic improvement process in which the tourism sector also started to develop with the cooperation of local actors and central governments.

Galicia and Uttarakhand regions are autonomously governed areas and these destinations adopt regional and local tourism development policies with the participation of local actors. Community-based tourism approach is prevalent in the selected destinations not only based on religious and cultural characteristics but also natural resources. Local people are also encouraged to play a role in the production of local tourism products along the trails and routes by offering their values like gastronomy, traditions, and cultural assets. Large extended training programs are also arranged for local communities to include them in the tourism sector either as entrepreneurs of a new tourism facility or as an employee at any stage of tourism management. In all the example destinations, the role of governance is considerably important to establish nearly all tourism organizations, i.e. those acting as destination management organizations (DMOs). In the structure of DMOs, chairs are from officials or, as in the Santiago example, DMO is the Municipality's company while they involve private sector directly or through their representative civil organizations. For Al Quds, this situation can be adopted differently by setting up the structure totally over relatively strong civil and nongovernmental initiatives due to the current political situation.

7.4.4. Technical / Technological

In all the destinations, pilgrimage routes are walkable and suitable for cycling. Besides, official bodies invest to improve the infrastructure. Accommodation and other services seem to be not sufficient to meet the demand. Therefore, one of the best practices observed in those destinations are to rent local houses to tourists directly by owners or through an intermediary. In all destinations, local tourism events and activities are organised such as music, dance, food and even yoga. For hygiene and cleanliness of cultural and religious sites, one destination deploys voluntary students and civil initiatives. This may be a good example for also Al Quds. Technological means are used to promote destinations and ensure tourist satisfaction.

7.5. Lessons for Al Quds

All benchmark destinations offer implementations for Al Quds. Based on the findings of the analyses conducted, in line with the methodology conclusions given below can be reached for Al Quds based on the comparative characteristics depicted in Table 27;

1. In the destinations evaluated, destination management organizations (DMOs) have been activated over a long period of time,
2. Destinations have benefited more or less from the organizations by attracting tourism investors, governmental infrastructure investment, preparing locals for tourism and many more,
3. Structure of the example DMOs may vary in the number of members but all of the organizations are composed of the members from the public (at management level) and private sectors,
4. One of the DMOs works under the body of municipality (city council) as a company,

5. NGOs or CBOs are placed in the structure of the example DMOs but at lower levels i.e., not at managerial level,
6. Each DMO evaluated prepares long term tourism development plans with concrete strategies and project ideas,
7. All the DMOs taken into account have concrete budgets, official identities, technical and financial support systems,
8. All the DMOs examined have a very effective website including every type of routine and innovative applications,
9. Some additional entities are founded together within the main body of DMO but this approach is not much recommended since there may be a collision of authorities and duties,
10. All three DMOs work like/as local development agencies for tourism since they determine tourism potentials, plan strategically and support the projects financially to implement their plans,
11. DMOs prepare and implement projects and provide finance, incentives, subsidies to new and existing projects,
12. Subjects of the projects DMO handle may vary but all involve subsectors in the tourism value chain,
13. DMOs can constitute a financial budget based on some income resources like taxes, fees, earnings etc.

Considering all the benefits it provides as mentioned above, a DMO structure is proposed to be established in Al Quds based on the following clues provided by the Benchmarking analysis;

1. DMO in Al Quds would be the principal body and include all the functions e.g., planning, implementing, promoting, training etc.
2. A realistic and analysis-based tourism development plan should be prepared immediately after the establishment of the DMO,
3. Even though the weight of NGOs and CBOs is not so much in the examples, DMO in Al Quds should be a strict civil based organization due to the lack of governmental encouragement and support,
4. Since in one example the functions of DMO have distributed among other bodies e.g., promotion, financial support, training, convention and event organizations, in a similar way a share can be performed among the NGOs in the composition of DMO based on their previous experiences and their achievements.
5. Destinations should attract tourism investors and infrastructure investment abroad and therefore NGOs experienced in this matter should be included in the DMO structure.
6. Exemplary DMOs are financially supported by the governments and include members from the public and private sectors as well as civil society in their structure.
7. One of the DMOs works in the body of municipality as a company and performs very diverse services from infrastructure to promotion. Therefore, DMO in Al Quds should consider such a structure which should control and consider the municipal services.
8. DMO in Al Quds should prepare a long-term tourism development plan and an action plan with concrete strategies and project ideas,

9. DMO in Al Quds should give technical and financial supports through an online system after securing funds,
10. DMO in Al Quds should have and operate a very effective website enabling every type of routine and innovative tourism promotion and application,
11. All three DMOs work like/as local development agencies for tourism since they first determine tourism potentials, plan strategically and support the projects financially to implement the plan, therefore the same structure should be adopted by the DMO in Al Quds,
12. DMO in Al Quds should prepare and implement projects and provide finance, incentives, and subsidies to new and existing projects using the funds it obtains from abroad.

Table 27 Summary of the characteristics of the example destinations

Characteristics	Statements	Al Quds	Uttarakhand	Sri Pada	San Diego
Political	Benefiting from the legal and political advantages of local and central official structures (e.g., visa and docks procedures)	No	Yes	Yes	Yes
	Destination is in an autonomous state/province/ region with cultural or political conflicts with the surrounding area	No	Yes	No	Yes
	Destination experiences political conflicts due to ethnical and religious differences	Yes	No	No	No
	The destination separated from a large governmental body by Law	No	Yes	No	Yes
	The destination has its own local or state government together with central one	No	Yes	No	Yes
	Visitors face procedural challenges from official / security bodies	Yes	No	No	No
	The destination has solved the problems caused by political conflicts and even civil wars	No	Yes	Yes	Yes
Economic	Destination suffers from the lack of legal and political ownership	Yes	No	No	No
	The economy in the destination is based majorly on the services sector relying on tourism-related activities	Yes	No	No	No
	Harboring important sacred locations, densely visited holy sites and cultural heritages	Yes	Yes	Yes	Yes
	Having the attractions for pilgrimage activities and trails/routes	Yes	Yes	Yes	Yes
	Religious and spiritual assets are the most important attraction for both domestic and international tourists in the country	Yes	No	No	Yes
	Destination can offer some traces and trails for cultural roots of some religions and nations to discover	Yes	Yes	Yes	No
	Destination has holy characteristics for the supporters of more than one religion	Yes	No	Yes	No
	Destination attracts in great majority of international tourists	Yes	No	Yes	Yes
	Destination encourages community-based tourism e.g., homestay by giving incentives	No	Yes	Yes	No
	Destination has a body to construct and monitor quality assurance system	No	Yes	Yes	Yes
	Destination has strategic tourism development policy document over the years	No	Yes	Yes	Yes
	Destination can provide financial supports and incentives from local and central government entities to investors and existing tourism professionals	No	Yes	Yes	Yes
	Religious – cultural aims or pilgrimage are the main tourism themes in the destination	Yes	No	No	No
	The quantity and quality are insufficient for accommodation facilities in the destination	Yes	Yes	Yes	No
Social	Destination has adopted concrete tourism development policies after cease of the conflicts	No	Yes	Yes	Yes
	Destination has a DMO – like body responsible for tourism development composed of the public, private and civil representatives	No	Yes	Yes	Yes
	Destination Management Organization is supported considerably by local or central government financially and technically	No	Yes	Yes	Yes
	There are civil based organizations which can play important roles in the development of destinations in the place of DMO	Yes	No	No	No
	Destination harbors sacred route(s) for some religions involving important shrines, temples and sites	Yes	Yes	Yes	Yes
	Rural population is larger in the destination	No	Yes	Yes	No
Technical /Technological	Literacy among the population is a great majority in the destination	Yes	Yes	Yes	Yes
	Destination needs to complete technical and technological infrastructure to access tourist attractions	Yes	Yes	Yes	No
	Destination can use a close airport for operations without any obstacles	No	Yes	Yes	Yes
	UNESCO is interested in the destination (included in World Heritage (Tentative) List	No	No	Yes	Yes
	There is more than one tourism development authority in the destination together with the ministry	No	Yes	Yes	Yes



Source: IRCICA e-library (<https://library.ircica.org/>)

8. Needs Assessment

One of the aims of this study is to identify educational and training needs of tourism businesses including their employees, managers and business owners located in Al Quds. In light of the analyses of views of tourists and tourism professionals in and outside of East Jerusalem, main areas that require intervention can be divided into four categories as Infrastructure, Service Quality, Financial Needs, and Promotion and Marketing and are summarized below; in this section.

8.1. Infrastructural Needs

Lack of organizational infrastructure beyond the physical infrastructure in the tourism sector of Al Quds has been intensely perceived. In the analyzes and interviews conducted within the scope of the study, problems such as the lack of regulatory institutions, weak or no cooperation between leading businesses, inefficiency in sectoral organizations, weakness of the management capacities of enterprises and, as a result, inability to benefit from domestic and international supports becomes prominent. As also indicated in the benchmarking analysis as well as supply analysis, DMOs play an important role in the management of tourism in conflicting areas thus it is suggested to build the Al Quds destination management organisation as a priority.

Tourism destinations need a DMO that, on the one hand, can coordinate efforts to improve the quality of services, and on the other hand, can carry out marketing activities. DMOs are necessary to solve conflicts between businesses and institutions, to coordinate physical and social infrastructure and to maintain (re)investments. The focus of DMOs is mainly to react to changes and to get ready for future tasks, such as diversification products/services to respond the increasing competition, and development of new markets which require budget for promotion and marketing³⁰⁵. Furthermore, DMO would help the businesses and the local people to increase their knowledge about Israeli legislation system and create awareness about legal rights. DMO would also serve as a solution point to solve some deficiencies by improving legal consultancy and technological capacities.

To increase the "sense of ownership" of tourism among the local people, the benefits of tourism have to be fairly shared. If they get a (even small) share, their interest in and support towards tourism would increase. DMO also would act as a "benefit distributor" for tourism partners.

Briefly, Al Quds DMO should be realized immediately with the financial (and technical, if necessary) support of international institutions. International financial support should also be provided during the first 5-year period for the DMO until it starts to cover its costs. Similar to the tasks carried out by other DMOs in the world³⁰⁶, the basic duties that Al Quds DMO would undertake are listed below;

- To strengthen cooperation between businesses while increasing the variety of products and services to raise the benefits of tourism,
- A "semi-public representative" who coordinates individual efforts (especially in times of crisis) and protects visitors,
- To improve tourism product/service quality and destination image, and entrepreneurial culture and consequently socio-economic positive impacts,
- To develop human resources, and to improve the skills of employees in all type of tourism businesses,
- Conducting research to understand market demands, current supplies of destination, and to address the gaps through planning and programs,
- Acting as 'economic driver' generating new income, employment opportunities and therefore contributing to a more diverse local economy,
- Seeking effective and efficient sources of financial assistance and venture capital opportunities,
- Destination marketing to transmit the most appropriate destination image, tourist attractions and facilities to target markets.

As physical infrastructural needs, the study exhibits that there is a demand and need for the renovation of existing hotels and increasing their capacities and/or building or opening new accommodation facilities in order to meet the needs in high seasons and creating capacity for

³⁰⁵ Bieger, Beritelli, and Laesser, 2009, 309-327.

³⁰⁶ Presenza, 2005.

the targets of; doubling or tripling the number of young and Muslim tourists; introducing new trails and activities or events such as "Pilgrimage +" or festivals. There is also need for boutique hotels.

Tourists can walk around historical, cultural and religious places during the day in East Jerusalem, but there is no activity in the evening. The absence of evening activities was mentioned as Al Quds' major weakness, especially by international tourism operators, and even they cited it as one of the main reasons for not staying at Palestinian facilities. It is necessary to enrich the nightlife in Al Quds (at least improving street lighting, keeping shops, restaurants and cafes and even historic and religious sites open and organizing cultural events) in order to increase the share of local people in tourism receipts. There is also a need to increase the number and quality of restaurants to introduce the local tastes and dishes.

In order to improve vividness of the city, regular cultural events, exhibitions, concerts, festivals and street entertainment should be organized. Various alternatives can be created, such as organizing events such as the Jerusalem Arab Festival, the Jasmine Festival, the Arabian Nights Festival or the Christmas Festival in December.

Financial problems in organizing such events can be overcome with the help of international donors. International sponsors, beyond providing direct financial support, sometimes also support such festivals by bringing musicians or groups. Cooperation with countries to hold joint cultural activities, one in Palestine and another one in the partner country, would be another option.

8.2. Needs for Service Quality

Tourism in Al Quds is mostly focused on religious and historical tourism, but it cannot get enough shares even from these activities. The main competitive "advantage" of Palestinian tourism businesses appears as the price. Hence, to raise the competitiveness of Palestinian businesses, rather than lowering price, new tourism types and products/services should be developed. Moving beyond the price competition requires an increase in the variety and quality of services.

On the other hand, although they have an advantage over Israeli businesses in terms of price, the prices of Palestinian businesses are more expensive compared to those in Palestinian cities, thus creating a disadvantage for them. Under these circumstances, collaborations should be developed with businesses in other Palestinian territories, and joint packages/programs should be developed, rather than competing on prices. This fact is of vital importance under today's increasingly competitive conditions for tourism destinations³⁰⁷. Regardless of their sizes, being small, medium or large and independently from their field of activity, even if businesses employ

³⁰⁷ Charles, 1997, 189 – 197; Becton and Graetz, 2001, 105–113.

qualified staff, they need to refresh and update the knowledge and skill levels of employees to increase their proficiency³⁰⁸.

In this context, the proficiency includes technical competencies associated with the effective performance of certain tasks (habitual actions) with technical nature and other individual characteristics mostly related to coping with technical tasks. Among the examples of technical proficiencies/skills are speaking a foreign language(s), serving food and beverage, using computers and information technologies, individual characteristics are like motivation, attitudes or personality traits³⁰⁹. The deficiencies preventing the completion of the quality works can be eliminated via the methods such as renewing the content of the work and updating the definition, improving the working environment and organizing technical training³¹⁰. Studies show that there are generally two types of qualification needs in the services sector³¹¹;

The need for knowledge and skills aims to reduce/close the gap between knowledge and the level of skills in the current situation and those required to increase the service quality.

The need for management skills aims to make those at the management level more qualified to have a better management function.

Investments in physical structures carry the risk that such structures may remain idle unless the quality of human capital is improved through training programs to ensure service diversity and quality. Therefore, one should bear in mind that one of the basic requirements of competitiveness is to improve the qualifications of employees.

The fact that the comments about employees on tourism websites are positive compared to other issues may stem from general characteristics of Palestinian people being friendly and hospitable. In this respect, it is important to note as repeatedly emphasized during the interviews with tour operators and in tourist opinions, there is a need for trained and qualified staff in the tourism sector. For example, tourists complain about the cleanness of the rooms and quality of room services. Considering such a concrete finding, it may be reasonable to employ more university graduates in the businesses located in the value chain of the tourism sector. In order to improve the qualifications of the staff, it can also be recommended to organize training courses such as welcoming, hospitality, housekeeping, etc. for people working or willing to work in tourism-related businesses through a public-private and university partnership. As a further step, vocational tourism high-schools may be established to increase the number of qualified intermediate tourism staff in every business. Among all technical skills enabling one to provide services at highest quality, it may be an important requirement for a tourism employee to speak at least one foreign language, cook dishes from local and international cuisines, use basic and

³⁰⁸ Aksu, 2005, 945–953.

³⁰⁹ Agut and Grau, 2002, 31–51.

³¹⁰ Bee and Bee, 1994.

³¹¹ Agut and Grau, 2002, 31–51.

sector-specific computer software and have improved general knowledge on tourism. It is again necessary to increase the qualifications of employees in the areas like foreign language, cleaning and hygiene rules. In the same way, as emphasized in the interviews conducted, local actors directly interacting with tourists on the streets of the Old Town, like shop owners, street sellers or craftsmen should be conscious about the importance of order and cleanliness of their workplaces and their surroundings (streets) for their health and for tourist satisfaction.

There is also an urgent need for tourism employees to receive training on the cultural values and elements (assets) of Al Quds and Palestine to gain insight and consciousness about them. They should also learn and know their legal rights and responsibilities according to both Palestinian and Israeli laws. Training for employees in the tourism sector should include communication skills, performing rapid, efficient and hygienic housekeeping services and the principles of healthy nutrition.

Content of the recommended training programs to be implemented in the short term for current employees in the sector is as follows.

- General tourism knowledge
- Speaking foreign language
- Rapid and efficient performance of housekeeping
- Having basic computer skills and competency in software used in the tourism sector
- Skills for food and drink service
- Communication skills
- Traditional cooking methods of local dishes
- Palestinian culture and attractions

Training to be delivered in the mid-term should be as follows;

- Legal responsibilities and rights
- Principles of healthy nutrition
- Occupational health and safety applications

Cooperation and training programs should be developed with international education institutions. For example, managers may gain experience by practicing in international businesses. Programs and training should also be organized to increase digital literacy and innovation skills in tourism enterprises. Besides, international collaborations should be developed for tourism workers and guides in businesses.

Based on the comments stated on tourism web portals, it may be stated that not only staff but also managers and business owners should spend some effort to improve their qualifications. Some Palestinian partners also mentioned that the managers/owners, mostly being the same person, resist or stay indifferent to adopt new management and marketing styles and meet changing demands. In addition to general management skills, the managers should also be efficient in the topics like human resources management, financial management, time management, how to encourage workers through incentives, leadership, marketing and sales and individual entrepreneurship and innovation.

Managers should also get training about updated management and governance methods as well as marketing and sales. In this context, in mid- and short-terms, training on the topics like the following should be given.

- Human resource management
 - Leadership
 - Motivation
 - Governance techniques
 - Participation
- Financial management
- Time management
- Customer relations management
- Development methods for marketing and sales

Tour guides in East Jerusalem are licensed by the Israeli authorities. In this framework, guides can receive training about the qualifications that Israeli government requires. For the current tour guides, courses to update and refresh their knowledge should be provided. Considering that international tourism professionals stated in the interviews that Israeli guides are "better qualified" than the Palestinian guides, intellectual knowledge of Palestinian guides should be increased to enable them to tell the stories of sites/monuments/building/history etc., not only from the perspective of Israel but also from the perspective of Muslims and Christians. DMO would also be the coordinator of all these training activities.

The result of the study shows that gastronomic elements, which are basic elements of today's tourism demand, are not sufficiently offered to the visitors coming to Al Quds. Within this context, raising the level of knowledge and awareness among tourism employees about (in)tangible tourism values in Palestine and Al Quds (as an important factor of Palestinian identity) is necessary not only for the tourism and economy but also for increasing the self-confidence of the locals.

Even though the tourists are reported to enjoy local food in Al Quds served in local restaurants, the number of tourists experiencing such tastes is also reported to be lower than expected. In this respect, it is evident that there are some limitations in offering local cuisine to tourists. From this point of view, even though serving local tastes to visitors is one of the best ways for locals to get a share from tourists' receipts, it is reported that food businesses in Al Quds offer tourists ordinary food and drinks which they can find anywhere rather than local dishes. It is also stated that the way the food is served to visitors could be improved to make it more pleasing. Especially European tourists can only eat snacks in their short breaks and do not taste local dishes. The findings stated above have the potential to reduce the competitiveness of the tourism sector in the region.

Similar to local cuisine, traditional arts and crafts have huge potential for tourism development in Al Quds. But unfortunately, the authenticity and originality of these also are in danger and this culture needs to be supported. Therefore, training about traditional arts and crafts should also

be offered. They would also be important tools for not only to spread the tourism benefits into the community but also to sustain the Palestinian culture and identity.

8.3. Financial Needs

As almost all Palestinian partners emphasized in interviews, financial problems are very big obstacles to development of tourism in Al Quds. Enterprises in East Jerusalem are living through very hard times to keep their businesses; financial support may be needed even for paying some charges to the Israeli government. Besides, services are more expensive in East Jerusalem because of higher prices land, rent, electricity and water costs compared to those in other regions. Most small-scale family businesses in East Jerusalem under the rule of Israel cannot benefit from public subsidies. Under such circumstances, they have lost their resilience to crises. If people can apply legally to grants and receive funding, they can invest in all types of tourism. Present and future legal situation of the city and Al Quds should be clarified/resolved and then investors should be attracted. For investments of new facilities, the architectural style and service diversity need to be taken into consideration to reflect the Al Quds atmosphere and culture.

It is vitally important to benefit from Palestinian diaspora as tourists and investors of any type in order to break legal and political barriers of Israel. In addition to deficiencies in accessing financial resources and investing in Al Quds, there is also a risk for losing the existing capital. Attracting investors or directing the investments of domestic investors and facilitating the investment processes will be among the important functions of DMO. Even this situation reveals that DMO is important for tourism development in Al Quds.

Moreover, the COVID-19 pandemic almost stopped all type of tourism business in Al Quds, as it did all over the world. Therefore, emergency financial support is vital to help Al Quds tourism SMEs to survive during this period and continue to serve after the pandemic.

8.4. Promotion and Marketing Needs

The present study revealed that, in addition to fragmented marketing efforts by businesses which are held individually and with very low budgets and problems to reach financial resources, it is understood that Al Quds tourism businesses have other major problems in terms of promotion; such as negative image about the destination, deficiencies in accessing into international markets and distribution channels, insufficient use of internet technologies in terms of marketing as well as management, and lack of technological innovation.

In this respect, since Al Quds seems to be separated from Palestine and the world, there is a need to have the following in place; develop online solutions by constructing a dynamic digital platform, (in addition to present ones for the promotion, marketing and selling with multilingual service), detailed and updated information about history, hotels, restaurants, what to do in Jerusalem, street network, maps, activities, events, distances to points of attraction, etc. The platform should be accessible via a mobile application and should also have links to social media.

The Israeli ministry of tourism spends large amount of financial resources to promote the area by emphasizing on the identity of "Jewish Jerusalem" for the area including East section of the city and ignoring the deep history and heritage of Muslims and Christians which is part of Al Quds. Tourism stakeholders in Al Quds cannot adopt such an aggressive promotion strategy because of lack of funds for operating tourism promotion offices all around the world, travel of marketing agents to these offices, training guides, etc. In place of such expensive activities, more modest and effective promotion methods should be adopted e.g., engaging world- famous bloggers, actors, musicians, celebrities and chefs for their visit to East Jerusalem and organize performances together with their local counterparts, make them to share their experience on social media to make the city visible, stay in a hotel, attend a concert, talk to local people, to hear and share their stories.

It is important to carry out also public relations and information activities beyond direct promotion. In this context, the following actions need to be taken to ease the effect of the measures imposed; lobbying activities in UNESCO and other important cultural institutions for the survival and development of "Palestinian identity and culture", as well as lobbying activities in international organizations. In addition, activities demonstrating the multi-religious and peaceful atmosphere of Al Quds should be organized in cooperation with religious organizations (celebrities can also contribute to these organizations). To raise international awareness about Palestinian tourism attractiveness, Info Tours for international media representatives should be organized.

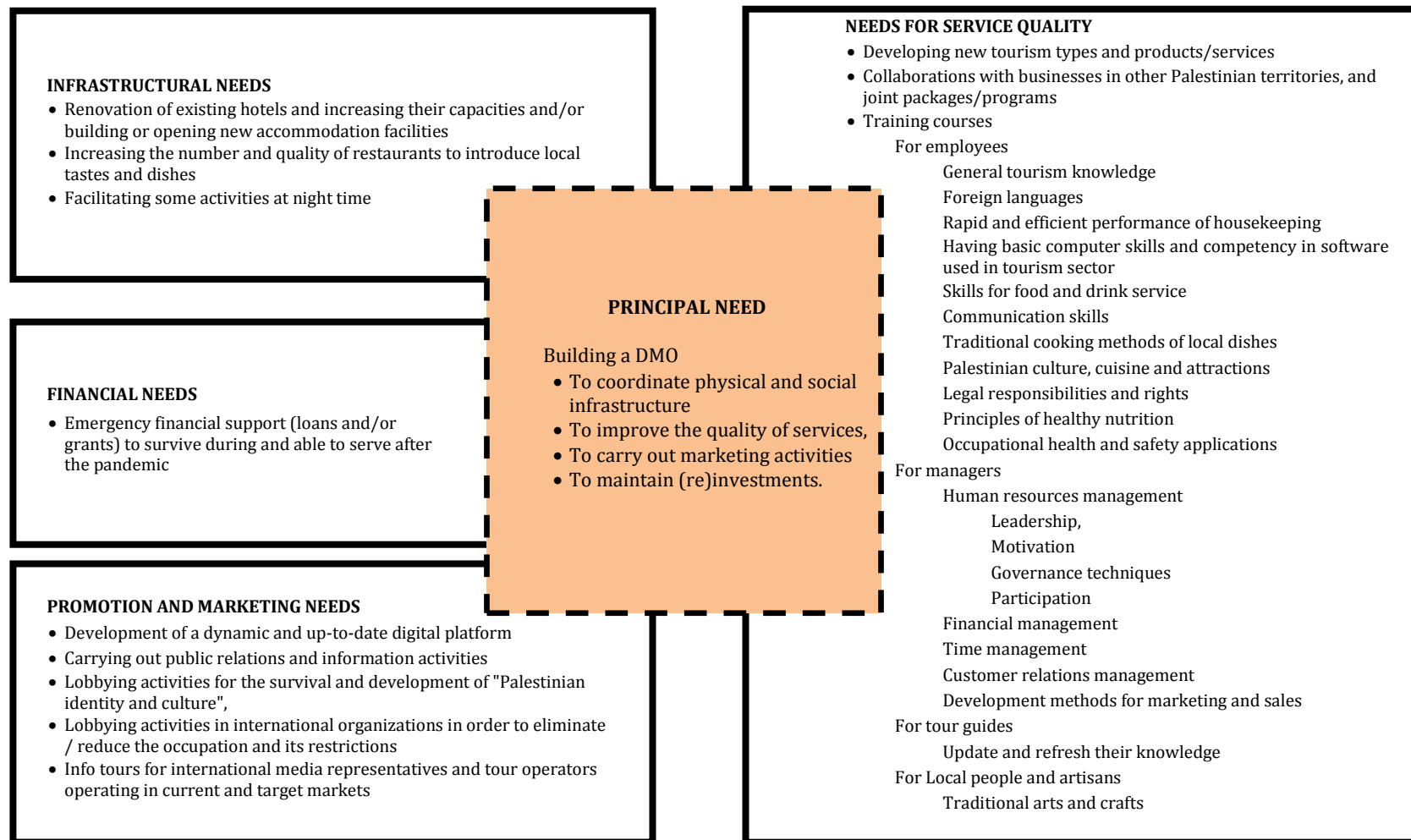
In order to extend the tourism profile and season, info tours and workshops should be organized with cultural and nature tourism agencies, products and services should be developed/diversified in line with their expectations. Info tours should be organized also for tour operators in existing and target markets, and workshops should be organized to bring them together with Palestinian operators.

Due to the lack of a responsible authority, tourism enterprises are in a position to promote and market themselves without receiving any financial or even technical support that could have been provide for some activities such as attending fairs or doing roadshows etc. Consequently, promotional efforts are not harmonized and are not directed by a strategic approach. Besides, their rival, Israel, promotes all the area under Israeli identity by ignoring the existence of Palestinians trying to make a dominant perception on visitors' mind.

Even this situation reveals the importance of being organized and acting together. Rather than fragmented and individualist efforts for marketing, it seems advisable to promote and market Al Quds as a destination only by acting together under a structure like DMO. Since its partners would decide the targets together; a DMO would coordinate and manage all such efforts. Moreover, beyond the fact that there are ways to self-finance the activities of DMO; many international organizations finance such institutions, resulting in a higher budget for promotion.

The needs mentioned above are summarized in Figure 39 below.

Figure 39 Needs Assessment





9. The Road Map

9.1. Governance

Destinations are not only physical spaces but also systems and networks, hence without the engagement of stakeholders and well-designed comprehensive development strategy, individual activities and actions might overlap, become fragmented and result in a waste of valuable resources and effort. Therefore, it is essential to manage all affairs regarding a destination through a single body inclusively representing all stakeholders in the targeted destination. It is proposed to establish a Destination Management Organization (DMO) for Al Quds for this purpose. An ideal DMO structure would lead to much-needed partnership and efficiency during the development stages of destinations. So, challenges related to coordination, dependency and sustainability can better be overcome through a central DMO that unites the power of individual stakeholders in Al-Quds. For example, in Uttarakhand, DMO (UTDB) was very effective in planning and coordinating infrastructure needs, or in Sri Pada, the DMOs run very effective efforts to diversify the tourism types and to increase the number of tourists. DMO may also designate the programs to increase the participation to, awareness and support for the tourism sector as it did in Santiago de Compostela.

On the other hand, "Branding", the most preferred concept among tourism marketers, is a very straightforward process. It is a "lengthy" process and needs to be supported by consistency and repetition. Therefore, it requires a first commitment to the destination and then comprehensive planning, strategy and creativity/innovation. Moreover, the brand requires and spreads synergy

between stakeholders. For Al Quds, building a brand as a “friendly, safe, comfortable, affordable and versatile, and at the same time, unique and spiritual destination having a remarkable history and atmosphere” is very important for the development of tourism. In this context, a slogan similar to "Enjoy Bethlehem" which proved to be very successful (e.g., "Feel Al Quds") should be created for Al Quds. Brands are created by and together with powerful people and partners. Therefore, all partners build the brand. This can only be achieved by a powerful organization including all related actors. The DMO structure proposed in this report should take the final decision about the proposed slogan which will be the basis of the Al Quds brand.

All the analyses indicate that tourism sector in Al Quds must cover its historical and religious importance, and also the rich culture. Therefore, the unique selling propositions (USPs) for Al-Quds are the inherent part of its history including religious and secular important assets, its multicultural and multi-religious atmosphere emphasizing the humanity and tolerance, and authenticity of its (in)tangible attractions. Using these USPs, Al-Quds should position itself as a “spirituality” brand. Moreover, as corroborated by SWOT, PEST and TOWS analyses, Al Quds should utilize both traditional (such as attending fairs, providing visual and printed documents, on-site events, lobbying activities, “Fam Tours” for tourism professionals/journalists etc.) and modern marketing tools (such as interactive applications, web-sites, mobile applications/shows, customer relationship management, active use of social media platforms, mass-mailing, utilizing celebrities/bloggers to reach the potential markets, etc.) to create such a brand.

As emphasized in the analyses and needs assessment section and seen from the benchmark destinations success stories, DMO is a very basic element for tourism development, especially in Al Quds. The importance and effectiveness of DMOs are widely accepted, however, there are different approaches to their structures. Pioneer DMOs were established, managed, and funded by the public administrations. Later, some destinations established DMOs under the leadership of the private sector. Both modalities had some constraints, public-based DMOs did not take market conditions into consideration, while private-based DMOs, besides financial deficiencies, had only "profit-maximization" perspective rather than public interests. Therefore, nowadays, public-private sector cooperation as a combination of the first two approaches comes to the fore, and it is even accepted that civil society also should participate in this cooperation³¹². As indicated in the benchmarking chapter, the DMO should cover almost all partners in the tourism and related sectors including the local community. For example, in Uttarakhand, the DMO included both private and public sectors. In Santiago de Compostela, it was proven that representatives of local communities, NGOs and related and support sectors should also be in the DMO to achieve a tourism development benefiting to all segments of the community. In Al Quds case, as mentioned by the Palestinians tourism partners and as incongruent with literature, the structure of DMO should cover all partners (in)directly related with the tourism sector and it seems more viable and realistic that its operational budget should be financed by international institutions, for the initial years.

³¹² Presenza, 2005.

Beyond this fact, Palestinian businesses in Al Quds face great difficulties as the Palestinian states sovereignty in Al Quds is prevented by Israeli authorities and the Israeli administration's policies do not support the Palestinian business and the people. Therefore, they urgently need a superstructure that defends/protects them. Furthermore, the absence of organizations in certain sub-sectors such as F&B, handicrafts or car rental, (partly they exist formally but largely inactive) creates gaps in strategies and actions which should be holistic. During the interviews, many of the Palestinian partners underlined that the absence of a comprehensive tourism development strategy in which the roles of all stakeholders are to be defined, is a big challenge to address. Different stakeholders had divergent and contradictory expectations which need to be resolved and unified. In this context, in order to develop the tourism in Al Quds, it is necessary to establish a structure with maximum participation of all stakeholders, to sustain tourism activities in a holistic manner. It has been revealed in the interviews that there have been some initiatives. The most recent (and perhaps prominent and successful) one is Al Quds Tourism and Heritage Council (ATHC). As stated by the Palestinian partners during the interviews, working in collaboration with the associations/establishments in the fields of tourism, culture, business and education, ATHC aims to develop tourism in Al Quds in a way that would benefit the whole Palestinian community. Moreover, it was also stated that the vision of ATHC includes development of cultural heritage and community-based tourism to make Al Quds an attractive destination for both locals and international tourists. Therefore, it is recommended that Al Quds DMO should be based on the efforts of ATHC as the best possible candidate to assume the role and responsibilities of a DMO since its members are much better integrated to tourism strategies. Continuation of the ATHC initiative and its transformation into a DMO would also be functional in terms of continuation of the efforts and burden taken so far. In this context, it seems appropriate to transform ATCH into Al Quds DMO, with the help and leading role of its members (AHA, ATGU, HLITOA, JTC, and NEPTO). As stated in the value chain analysis, since the importance and dominance of ATHC members in Al Quds tourism sector are evident, it may be the most appropriate way, to start the DMO with its leadership and support. However, the active participation of all other actors mentioned in the value chain is also very important for success. Moreover, in addition to the sector representatives, also the involvement of representatives of support and related sectors, and the local people will ensure long-term sustainable success. It should also be noted that under COMCEC Al-Quds Program, a separate project titled "*Supporting Institutional Capacity of Al-Quds Tourism and Heritage Council (ATHC)*" is being carried out. The outcomes of this project which aim to increase the capacity of ATHC, would also contribute to the effectiveness and sustainability of ATHC (hence, the DMO) in Al Quds.

The structure of DMO in Al Quds (hereinafter referred to as the Tourism Board (TB)) should be participative as widely as possible and should be managed professionally. It should be managed by an executive board which would be elected by the general assembly which includes representatives of the actors defined in the value chain, to the widest possible extent. The executive board will supervise the professional manager and the staff.

Professional duties would be under the responsibility of a CEO. The CEO's salary should be determined by the general assembly and he/she should be appointed by the executive board for at least 3 years (contract renewable if the board deems) and must have (at least);

- bachelor's degree in Business Administration, Tourism Management and similar disciplines (master's and doctorate degrees are preferred)
- work experience in areas similar to this position or managerial experience in the tourism sector
- At least one advanced foreign language (English)
- Managerial skills
- Communication and marketing skills

Professional staff should be appointed by the CEO and employed on an annual contract (renewable if the staff is deemed appropriate). Initially, 5 employees to focus on finance, human resources (training and standards of qualifications), promotion and marketing, digital transformation, and product diversification would be hired. Later, more staff may be employed if needed. Employees must (at least) have

- bachelor's degree or work experience in the tourism sector
- bachelor's degree or work experience in planning and marketing
- bachelor's degree or work experience in human resources and financial management
- university education or industry experience in internet technologies
- a good grasp of digital innovations
- acquaintance with Israeli and Palestinian legislation
- experience in project writing and management
- at least one advanced foreign language (preferably English)
- advanced computer skills
- flexibility and ability to work under stress
- communication and marketing skills

On the other hand, the organization should have a broad spectrum of members and include (at least) the following:

- **Private sector representatives** such as AHA, HLITOA, ATGU and, alternative tourism initiatives such as Visitpalestine.ps, ATG or Network for Experimental Palestinian Tourism Organization (NEPTO) and its members. The organizations which, even if are not fully functional can be revived, like Arab Tourist Restaurant Association, Arab Tourist Transport Union (ATTU), Holy Land Merchants of Souvenirs and Handicrafts should also be considered.
- Islamic and Christian **religious institutions** like Awqaf, Churches or The Holy Land Christian Ecumenical Foundation (HCEF)
- **Universities** such as Al Quds University, Bethlehem University, Birzeit University
- **Chambers** like The Jerusalem Arab Chamber of Commerce and Industry (JACCI)
- **Support sectors** like ICT service providers, trade support institutions, airline representatives. These are not necessarily included in the organization as members but, they can take part in an advisory committee to consult when necessary.
- **NGOs** to reflect the expectations and wishes of local people

Benchmarking study underlined that DMOs may have a spectrum of varied responsibilities. For example, beyond other responsibilities and duties, while DMO is responsible for planning and designating the future achievements and implementing the decisions, in Santiago de Compostela, or for marketing, image building, in Sri Pada; human resources and quality assurance are amongst the core focuses of DMO in Uttarakhand. On the other hand, although there is a big variety in the structure and activities of DMOs in different countries and even within the same country, planning, training, marketing and operational issues constitute critical fields of activity, as stated also in COMCEC studies.

In light of the literature, SWOT, PEST, TOWS analyses, and the examples of benchmarks, and as detailed in the needs assessment section, the main responsibilities and focus of Al Quds DMO would be;

- 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
- Organizing and carrying out promotional and marketing activities
- Negotiation with worldwide on-line reservation platforms

The organizational structure, responsibilities (development, marketing and management), funding, stakeholder relationships and coordination of these organizations also present challenges to be addressed in order to identify the most effective institutionalization strategy for Al-Quds. Beyond helping marketing efforts more efficiently, the effective collaboration between all relevant partners would provide consensus on many development initiatives. Also, taking into account that the interests of Palestinian actors neglected by the Israeli Municipality and Government, collaborative actions are needed to coordinate the functions in terms of setting standards, and qualifications, lobbying, etc. This is particularly important, since the Israeli side's plans designed not to support any economic, social and cultural activity in Al Quds³¹³. The main problem here is likely to be the financing of the organization and its activities. Although, by definition, *"Destination management organizations typically rely on public sources (government funding) or private sources, funding from hotel room tax and membership fees"*³¹⁴ and it is also possible for the members of Al Quds TB to pay certain dues, the organization would need external financial support from international organizations at least during the establishment phase and within the first 5 years of operation.

³¹³ Jafari and Abdullah, 2019.

³¹⁴ COMCEC, 2018; 318.

As stated above, international institutions must provide technical but more importantly financial support for a period of 5 years to establish and activate the Al Quds TB. Therefore, the financial source(s) should be identified first by contacting international institutions. This is because the partners generally do not have much income from tourism and do not have proper means to cover the costs of such an organization. In this context, it should be stated that it needs the support of international institutions such as The Organization of Islamic Cooperation, League of Arab States and other international donor institutions. After 5 years, TB should increasingly rely on self-funding, which includes advertising revenue, membership dues, and revenue from online booking/reservation services etc. The Figure 40 recommends a structure model for Al Quds tourism board.

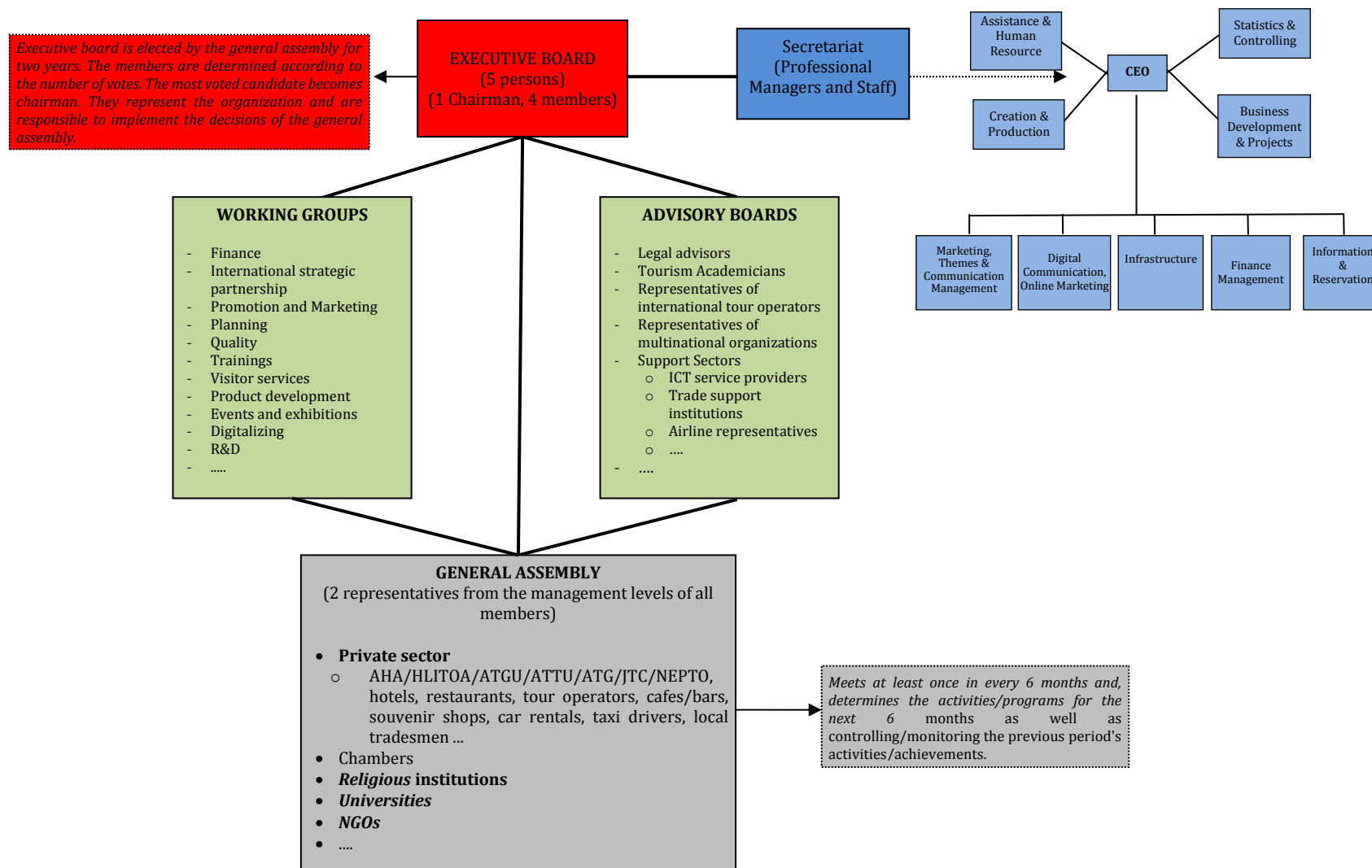
In addition to regular tasks, as the direct link between visa facilitation and growth in tourism demand, economic growth and job creation are clear³¹⁵; aggressive lobbying activities should be held to facilitate border formalities and access of visitors (especially from Arab and Muslim countries) to Al Quds. This is a task that must be undertaken not only by public officials but also by the real owners of the sector. Therefore, TB will play shelter role for tourism in Al Quds and related sectors, which will include infrastructure, superstructure, service quality, transportation, communication and more. This will be beneficial for both locals and tourists.

By contacting alternative financial resources and funders, TB should also facilitate the access of businesses to financial resources they need for establishment and development of the variety and quality of the activities, beyond finding support for financing its comprehensive activities. Besides, in cooperation with institutions such as PIPA and PalTrade, it should encourage the entrepreneurs' particularly in Muslim countries to invest in Al Quds tourism and/or to establish partnerships with Al Quds tourism businesses.

Collecting and analyzing tourism-related data is important. The absence of accurate and reliable statistics harms the validity and operability of plans and programs. TB would also serve as an information center to provide official guidance and comprehensive information to tour companies, hotels and tourists. TB can also ensure that more reliable and accurate data can be obtained for Al Quds in cooperation with PCBS to better monitor tourism development.

³¹⁵ UN, 2014.

Figure 40 “Proposed” Model for Al Quds Tourism Board



In light of the above, the key responsibilities of TB would include to;

- develop and implement a harmonious development and branding and marketing strategy,
- determine the standards and improve the tourism products, tourist experience and service quality,
- coordinate and optimize the activities among the wide spectrum of stakeholders,
- coordinate training deliveries, beyond serving a tourism information center, and providing educational materials,
- search funders, donors and grants for its own and members' activities.

Moreover, as the municipality of Jerusalem does not take care of some duties, the TB would undertake some tasks, such as cleaning (e.g., garbage collection) and aesthetic improvement in urban areas such as signaling and renovating facilities.

9.1.1. Performance Indicators

Performance Indicators are metrics for measuring a progress or achievement. They are useful tools for monitoring the performance of organizations and projects, to determine the success of any activity (such as products, programs, projects, or any other activities). One cannot control a parameter if it is not measurable since it will not be possible where the intervention is required. In this context, it is recommended to use the following performance indicators to organize and identify areas of intervention for the TB and for measuring its success. After foundation of TB, the members should set the target values for all indicators. They should monitor these targets periodically and take necessary actions to achieve these targets.

- The longevity of tourism businesses (rate of turnover)
- Percentage and value of local products and produce sold to tourism facilities and businesses
- Total contribution of travel and tourism to GDP (%)
- Number of tourists visiting for non-religious reasons
- Increase in number of international tourists
- Number of Asian tourists
- Increase in number of domestic tourists
- Ratio of tourists to locals (annual average, peak season & peak day average)
- Increase in hotels' occupancy rate
- Increase in the average length of stay
- Average spending per tourists
- Daily spending per overnight tourist
- Increase in the number of hotels
- Increase in the capacity of hotels (rooms and beds)
- Number of renovated accommodations
- Increase in the number of hotels having online booking systems

- Increase in the number of travel agencies
- Increase in the number of travel agencies having its own packages and tours
- Increase in the number of F&B facilities
- Increase in the capacity of F&B facilities
- Increase in the number of licensed tour guides;
- Number and average age of tourist buses
- Tourism employment as % of total employment
- Percentage of seasonal jobs in tourism
- Average hourly wage in tourism compared to other sectors
- Local unemployment rate in the off-season
- Increase in the number of trained employees
- Increase in the number of the employees in the sector
- % of men & women employed in the tourism sector
- Number of institute and college graduates of the various tourism professions
- Number of training courses
- Increase in the number of outdoor activities organized in one year
- Number of F&B facilities or other attractions open until 10 PM
- Increase in the number of conferences and workshops held in hotels
- Increase in the number of traditional craftwork shops
- Increase in sales of traditional products
- Number of promotional programs/campaigns in one year,
- Frequency of promotional programs/campaigns,
- Number of people reached by promotional programs/campaigns,
- Satisfaction level for accommodation,
- Satisfaction level for services by travel agents
- Satisfaction level for F&B facilities
- Satisfaction level for transport
- Overall satisfaction level of tourists
- % of repeat/return visitors (within 5 years)
- % of residents satisfied with the impact of tourism

9.2. Diversification of Tourism Services

The fact that tourism in Al Quds is largely based on religious motivations causes an extreme seasonality problem and it leads to a massive under-utilization of available capacities and curbing investment and growth. Therefore, tourism diversification is of great importance. Diversified tourism will ensure that the activities are spread over longer time periods. It is stated that MoNE³¹⁶ underlines the best season for walking tours from November to April-May, and promotion of this period with accompanying organizations will enable local people to earn more

³¹⁶ MoNE, 2014.

income from tourism. Beyond that, these activities would help Palestine to open up to the world, and improve the image by connecting locals and visitors.

In line with a routing approach, thematic programs/packages covering activities such as biking, hiking, sightseeing, tracking and camping, farming, olive picking with locals, visiting refugee camps, or related with cultural aspects like cooking, folk dancing (dabka) or handcrafts (like wooden crafts or embroidery) classes, or camel rides, should be developed, in Al Quds and the vicinity. The newly introduced tours should mainly focus on Al Quds promoting the city as a major destination not a stopover location. For example, in Petra (Jordan) to spice up the gateway's relatively dead evenings, restaurants set up an evening workshop in Bedouin cuisine, with tourists cooking and eating dishes that they prepared. A similar activity can be implemented in Al Quds restaurants or as an outdoor event. In addition to revitalization of routes implemented in the past, such as Palestinian Heritage Trail and Sufi Trail, new routes can be introduced such as, Three Hills of Al Quds Route, Track of Salah-Al Din, Trace of Ottomans. Such routes and products would be appealing to Muslim tourists. In addition, some tours and packages that offer Al Quds and Mecca together (like the trail of "ascension") will also be attractive for Muslim tourists travelling for religious purposes. Likewise, tourism packages with special activities and prices should be organized to stimulate domestic tourism.

Moreover, SWOT analysis and interviews with tourism professional clearly point out that, cultural elements should be included in the tourism experience. Hence, local (in)tangible cultural assets highlighting the Palestinian identity should be embedded into the tourism products/services. This is of importance for both religious and cultural tourists as well as increasing the ownership and awareness of the locals. An inventory of stories can be the basic component of promotional activities which would be utilized for promotion, in news, and also for advertising. Moreover, in addition to religious routes, routes based on mundane elements such as routes of folk tales dealing with themes such as love/heroism, routes related to the content of internationally renowned books/films in Al Quds (such as O Jerusalem by Larry Collins and Dominique Lapierre, Jerusalem by Pierre Loti or Jerusalem: Chronicles From The Holy City by Guy Delisle), migration routes of nomadic people (such routes can be particularly attractive to trekkers, nature lovers and campers) would create alternatives for guests and increase both the number of overnight stays and average expenditures.

Apart from these, for mission officials and employees of international institutions/organizations can participate, especially for enjoyment of leisure time and weekends, programs such as half-day walks around Al Quds or archaeological tours to other cities. Some programs like participation in local weddings, learning and practicing Palestinian dances/cuisine, or sharing ideas with Palestinian youth may be organized. Consequently, mission officials and international employees may also experience intangible cultural heritage. Such activities, beyond economic benefits, would provide a more accurate explanation of the Palestinian interests and reflect positively on the image of the country.

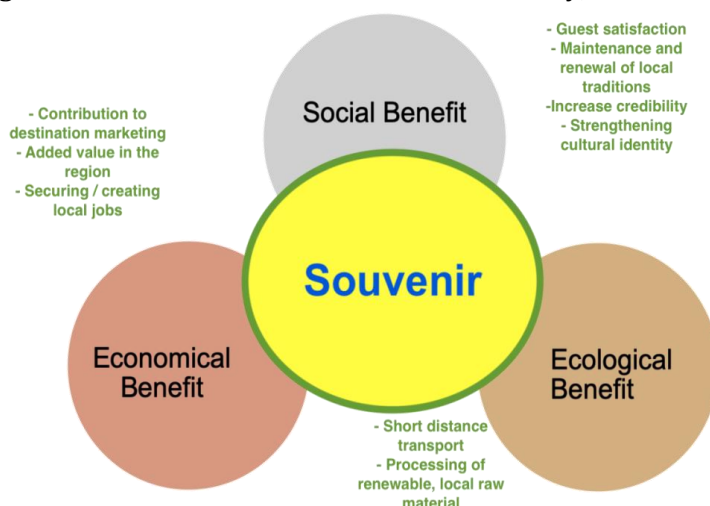
Alternative tourism, which several Palestinian tour operators have already attempted, can be an initiative not only for economic benefits but also for guest and host interaction (indirectly, for

fixing the negative image and thus creating a positive image) and environmental protection. For example, solidarity/politics/justice tourism is flourishing and should be further supported by lobbying activities. Volunteer/international tourists may help build peace since they would observe events between Israeli settlers and local Palestinians.

Moreover, such alternative tourism programs/activities should be expanded to include alternatives such as "Palestinian quarters of West Jerusalem", "Wall of Israel"³¹⁷. Palestinian diaspora, Islamic heritage, business, ecotourism or cultural tourism alternatives should also be considered.

Another important element is souvenirs. Souvenirs do not only generate added value with their production and sales, but they also serve as distant advertising ambassadors and marketing means. They make the symbolic message and brand values of a destination tangible. Provided that a souvenir product is attractive, it conveys a clear message and has an easily recognizable and convincing link to the tourism destination. The marketing impact and sales are determined by different expectations and needs of the target groups. These in turn are influenced by trends such as the increasing demand for sustainable, i.e. ecologically, economically and socially compatible offers and the desire for tailor-made products and services. Sustainable development (of the tourism industry) is also increasingly being sought on the part of large scale enterprises and politicians.

Figure 41 Use of sustainable souvenirs for society, the economy and the environment



Source: University of Applied Sciences and Arts "Hochschule Luzern" (2016).

Souvenirs that are made from regional and natural materials on-site, a reference to the destination, the attraction visited are regarded as sustainable for the tourism destination and bring joy and benefit to the buyers. Local or regional resources should therefore be used,

³¹⁷ Brin, 2006, 215–243.

which include both raw materials and cultural resources such as regional handicraft techniques.

The use of sustainable souvenirs is varied and affects not only the ecological but also the social and economic dimensions. Primarily souvenirs should trigger positive emotions among buyers and recipients. An attractive range of souvenirs that suits the destination increases the credibility of the destination and increases the satisfaction of those guests who like to buy souvenirs with a real local connection. Sustainable souvenirs based on traditional crafts or refer to a local tradition also help to strengthen cultural identity.

If locally available, natural materials are to be used in manufacturing of the souvenirs, this protects the environment because long transport routes are avoided and no artificial materials have to be produced. So-called sustainable souvenirs are not only environmentally friendly and create social benefits, but they also meet economic needs. Their production in the region creates added value and jobs can be maintained or even created. Besides, good souvenirs make a valuable contribution to marketing the respective destination, if they are given away as gifts, trigger conversations, awaken memories of the holiday and/or encourage visitors to visit their place of origin themselves.

Diversification is also needed in the tourism market. As an important opportunity and a new market, the entire tourism industry should prepare itself for Eastern Asian tourists. Not only language requirements, but also the quality and variety of services and activities must be guaranteed for this target group.

Another area of diversification is the daily activities offered to tourists. One of the major complaints of tourists and tourism professionals is the lack/scarcity of activities in Al Quds. Therefore, street arts such as painters, dancers, musicians (especially folk music and dancing) to be performed in the old city or theater shows would be worthwhile to consider. Also, apart from traditional travel programs, one day or half-day excursion possibilities around Al Quds on different themes (as mentioned above, love, novel, Arabian Tales of the Thousand and One Nights, etc.) will keep the visitors active. The severest complaints are expressed when it comes to nightlife. Many interviewers stated that Al Quds is "eerily quiet" in the evening hours and the nightlife of East and West Jerusalem is different as "day and night". Moreover, it was stated that the lack of attractions at night is amongst the main reasons why the operators do not want to stay in Al Quds, in addition to the physical conditions of the hotels and the inadequacy of the service quality. In this context, night tours in the Old City and its vicinity may be organized to entertain tourists in the evening, after their participation to other programs/excursions during the day. Furthermore, shows, small contests, which small prizes are given to correct answers about Palestinian culture, and music and dance performances (enabling/encouraging guests to participate) should be organized and traditional (but creative and innovative) Palestinian nightlife and entertainment should be offered to tourists.

9.3. Quality

9.3.1. Human Resources and Service Quality

High quality and efficient public and private sectors are based on educated and trained human resources. Therefore, to be able to compete in the tourism industry, qualified personnel, who guide or serve the guests and plan and implement marketing and advertising programs, is of utmost importance.

The friendliness and the quality of the employees are by far the most important factors for a successful vacation³¹⁸. A service with personal advice, which goes far beyond the fact-based and online knowledge, is an important aspect for the future design of offers and approach to guests³¹⁹.

Policymakers (in the case of this study, the Al Quds Tourism Board) must invest in the development and implementation of training programs for tourism-related human resources. The analysis of tourists' comments on online reservation sites and interviews with tourism professionals reveals that human resource capacity development programs should include all actors such as

- Public staff (may not be valid for the case of Al Quds, but it is necessary when considering whole Palestine)
- Hotel staff
- Travel agents' staff
- F&B staff
- Guides
- Handicraft artisans
- Drivers
- Residents. The community should also be involved, as tourists may prefer home-stay and locals are crucial components of tourist experiences. For this reason, capacity building and awareness-raising programs are necessary to demonstrate the importance of tourism for local people and clarify the responsibility of each member of the community for the development and improvement of the sector.

In addition to above, it is necessary to raise awareness of businesses and ensure that they are accredited especially about cleanliness and new hygiene rules and practices, which are now clearly accepted as the most important factor in the preferences of tourists after COVID-19 pandemic. In this regard, TB would be the key institution to set the regulations and controls. Therefore, managers should also be trained in this sense. Likewise, managers should be trained in technical aspects and managerial issues like time, finance and human resources management. These training should enable them to manage their business more professionally.

³¹⁸ WKO Bundessparte Tourismus und Freizeitwirtschaft, 2020, 114.

³¹⁹ Kotler, Kartajaya, and Setiawan, 2017, 12.

Public training programs intended for residents may cover:

- language courses (initially German, Indonesian, Polish, Ukrainian, Chinese and Russian) for current and future tourism professionals for, but not limited to, guides,
- courses about hard and soft skills for people engaged in tourism-related activities such as transport, catering (especially for local meals), security, communication,
- periodic training, especially for Palestinian guides, to meet standards determined by Israel and to obtain necessary certification,

should be designed.

Besides, universities/educational institutions should take part in international cooperation to ensure that the curricula/syllabi keep up with the current trends, and the sector should employ more people who received tourism education. Internships can be compulsory in the curriculum and they should be supervised technically. It is also recommended that subsidies should be provided for the trainees themselves and the institutions that employ trainees.

Palestinian educational institutions should build partnerships with recognized foreign academic/training institutions and they should be included in international student exchange programs. Furthermore, in addition to university education, vocational tourism high schools should be established in order to train intermediate personnel. It is also important to take some measures to support the increased participation of Palestinian women in the tourism sector, in all of these trainings and education programs.

Tourists and tourism professionals complain about the cleanliness of facilities and urban areas. The high number of such complaints emphasizes the necessity of urgent measures. Although there are restrictions on the urban environment because of Israeli policies, the Palestinians especially business persons and employees should pay attention to cleanliness. There is a need to raise awareness about the importance of cleanliness especially for the facilities (and particularly the rooms of the accommodation facilities) and the streets. Therefore, to build/increase awareness and capacity, trainings/campaigns should be organized for the housekeeping staff and city tradesmen and residents. For example, as one of the Palestinian partners suggested some certifications (such as “the cleanest shop/facility”) may be implemented for the local community and shop owners to encourage them to comply with the standards determined.

When planning training courses, the expectations and requirements of new markets (especially East Asia) should also be taken into account, and both managers and staff should be trained and qualified to be able to satisfy visitors from these markets. For example, explaining the different and diverging needs of the tourists coming from this market, teaching basics of their language (e.g., Chinese/Korean/Japanese), or cooking their favorite food or arranging the traditional cuisine in a way that will attract them, may be a good start.

9.3.2. Renovation of Facilities

In the future, hotels will integrate the most beautiful, most valuable and the best from the local culture into their offer and make the holiday tangible with all the senses³²⁰. In a world that is confusing for many people, the hotel business assumes a role of anchor for familiarity during holidays. As people have a growing desire for attention, the role of hosting business becomes more important. In principle, the stay in the hotel will have a lot more meaning and it must be pleasant even for a short period of time. The guest wants to experience the feeling of having arrived, to be accepted and personally received³²¹. Hotels are more and more moving towards and becoming experience, service and meeting centers with the possibility of overnight stays. This means that the sale of overnight stays will no longer be the core concept of the hotel industry in the future. Rather, renting and selling additional rooms, special services and the special experience are at the center of the business models³²². During COVID-19 pandemic employees experienced that work outside the office is also possible. Many entrepreneurs took away that the work can also be organized differently. For the future, it can be assumed that work and free time can no longer be separated and that hotels will become temporary homes with the opportunity to work. A hotel lobby and bar can become a central communication point³²³.

As expressed by tourism professionals and tourist comments on online booking sites, increasing the attractiveness of hotels, restaurants and tourist markets in the Old City and also its surroundings and therefore should be urgently in place. In addition to increasing accommodation capacities by reopening non-operating hotels or building new ones and targeting branded hotels, existing hotels must be refurbished and renovated to meet international service standards.

Local cafes and restaurants, especially at and around Salah-al Din Street, should be refurbished and improved in a way to reflect Middle Eastern and Palestinian culture. Again, especially F&B facilities should be encouraged to serve menus comprising local cuisine in their daily menus. In this context, to ensure satisfaction in the quality and presentation of the meals, the staff should be trained in authentic cooking techniques of local dishes as well as presenting food in an attractive manner. Moreover, it should be underlined that the local dishes should be offered at affordable prices.

9.3.3. Urban Services

In Al Quds, Palestinians are the disadvantageous side since they face problems related to physical infrastructure and lack of service delivery even though they have to pay tax for those. In Al Quds, one problem category for Palestinians is that urban services are not delivered appropriately to the sections of the city where Palestinians live or work. Since Israeli public

³²⁰ Seidl, 2019.

³²¹ Kretschmar-Joehnk, 2020.

³²² Borkmann/Klein/Lambertus, 2016.

³²³ Kretschmar-Joehnk, 2020

service providers are only interested in Jewish settlements in Al Quds, Palestinian neighborhoods need renovation and restoration (streets, facilities, parking areas, green parks, etc.). Another problem area for the Palestinians in Al Quds is related to physical structures in the city. Palestinians experience great difficulties in renovating their buildings used for commercial activities such as accommodation.

On the other hand, idle buildings in the Old City can be used as exhibition space or museums or even transformed into hotels. In addition to the abovementioned problem areas, documentation and mapping of historical, cultural and religious assets and signages about historic/religious sites and other cities must be installed.

As stated under the needs for diversification of tourism activities, there is a need for supporting artistic performances (painting, music, dancers, etc.) on the streets of the Old Town or around points of interest. Urban infrastructure should be suitable for these types of performances. Since the Israeli government and the municipality of Al Quds do not care much about quality in the physical structure and social life in Palestinian neighborhoods, and businesses cannot organize these activities by themselves, such activities should also be undertaken by the TB.

When the problem related to urban infrastructure is considered in more detail, another need is identified to be to open recreation areas and attractions not only for tourists but also for local people. As Al-Rimmawi³²⁴ points out, a significant number of greenfield visitors live in the region. Although there are no major problems in transportation among the major urban services in the city and the biggest source of problem seems to be the practices of the Israeli side (checkpoints, movement restrictions etc.), transportation improvements would play a role to increase satisfaction. In this context, transportation should mainly be carried out by environment-friendly vehicles and taxis (provided that they are acquired and drivers are trained). Also, bicycles or other personal vehicles such as electric scooters should be utilized as means of transportation in historical districts and their surroundings. Moreover, there should be more and diversified transportation options to attractions, other cities, and to Jordan. Rental car services should be improved as Israeli rental companies do not allow vehicles to enter the Palestinian territories.

9.4. Promotion and Marketing

The most powerful communication and promotion tool of today is the virtual world. Therefore, in addition to the real-world, promotion and marketing efforts must be carried out in virtual world as well. Social media presents tools that make communication interactive and quickly accessible around the world. Younger generations have already been born and raised in online communities. Therefore, it is important to be familiar with effective use of social media by posting content frequently and building brand communities. All tourism facilities should improve the quality and content of their websites, diversify communication tools by developing social media presence and strategy for websites, and utilize the creativity/innovation to attract

³²⁴ Al-Rimmawi, 2003, 76-85.

visitors. Beyond updating websites and providing satisfying and accurate information, it is also important to implement online reservation and payment systems. Businesses should also be members/part of international reservation systems.

In this context, the websites of TB and MoTA should be re-arranged to act as a portal in this context and a secure booking and payment system should be established for tourism businesses in all Palestinian territories and particularly in Al Quds. Both TB and MoTA's websites must have an online booking platform for hotels and provide the following information;

- dynamic list of hotels, F&Bs and events/activities
- specific places/attractions/activities for the regions in Palestine and each point in Al Quds,
- ideas for personal tour itineraries

Also, the portal should act as a medium to share experiences and how misconceptions have changed after visiting, utilizing videos of tourists, blogs, social media pages, etc.

Marketing and promotion should target existing markets as well as countries having Muslim population such as Singapore or Kazakhstan, Turkmenistan, Uzbekistan, which have a higher chance of obtaining visas from Israeli authorities. Similarly, Muslim and Christian citizens of countries such as the USA, United Kingdom, France, and Germany that do not need a visa to enter Israel should be focused. Besides, as mentioned above, aggressive promotion campaigns should be organized in Asian countries, which are increasingly becoming important markets in the world tourism. These markets carry a high potential for tourism in Al Quds.

Both the reviewed Israeli documents and collected tourist opinions (through both online internet reservation sites and online survey) point that although there is an abundance of promotional materials that reflect the Israeli perspective of Al Quds, the lack of promotional materials reflecting the Palestinian perspective is obvious. Hence, as indicated by both stakeholders and the results of the online survey and considering that benchmark destinations successfully produced those, it should be emphasized that digital and classic promotional documents are important. Analysis on tourists' comments and interviews with tourism professionals revealed that marketing efforts should focus on the use of digital tools, including the development of promotional activities, creation of user-generated content and creative and innovative applications. Promotional documents that can be accessed both in print and online should be prepared in the languages of the current and main target and emerging markets. In addition, a map of attractions and activities does not exist. Identifying and mapping the sites and activities with a timetable of activities should be a priority. In this context, documents showing the year-round activities and the contents, dates and locations/routes of the festivals should be prepared.

Aggressive promotion campaigns should be held to eliminate the negative perception of safety and security for Jerusalem and Palestine. The messages must highlight the existence of friendly and hospitable people in addition to abundance of cultural, historical and religious heritage,

cuisine, traditions and arts and touristic activities. Such efforts should focus on the inclusion of Palestine and Jerusalem into "safe places" in the travel warnings of countries to their citizens. For this purpose, lobbying and info tours to government officials should be intensified. On the other hand, more effort should be placed on the nomination and acceptance of more Palestinian sites in the UNESCO World Heritage List. The list serves as free marketing campaign and creates a sense of credibility to both the listed area and the entire destination. Moreover, although it is expensive, the info tours/fam trips³²⁵ would be beneficial to raise awareness of both the international community and tour operators, as well as for opinion leaders, artists, journalists and industry representatives. Fam tours can be organized for celebrities, and as in the case of India, a globally known person can be selected as a volunteer ambassador of Palestine/Al Quds.

Al Quds should participate in internationally renowned and specialized fairs and conventions, congresses which will introduce marketing and lobbying opportunities. Faith Travel Association, International Catholic Stewardship Council, Mid Atlantic Congress, Evangelical Lutheran Church in America, National Organization for Continuing Education of Roman Catholic Clergy can be mentioned as examples for associations to be cooperated/engaged.

It is worth keeping in mind that cooperation with those regarded as competitors can also be necessary and beneficial. In terms of tourism Jordan (and Israel) is not only a competitor but also an important means of attracting tourists. Those who visit Jordan often visit Israel or most of the tourists visiting Israel come to the Old City of Jerusalem. Therefore, coordination, particularly with Jordan and introducing new tours, for example, Al Quds and Mecca and/or Al Quds and Egypt will contribute to the elimination of various obstacles that currently and negatively affect the sector.

Promotion activities (like other activities to be carried out by TB) should also seek support and finance offered by international donor institutions until the tourism revenues increase so that TB members can pay dues and TB can survive without external support. Promotional activities should focus on "Image renewal/correction" efforts in the short term, on emphasizing the religious/cultural importance and proximity to other travel destinations in the medium term. Afterwards (in the long term) product diversification and alternatives to religious tourism (ecotourism, culture tourism, congress tourism, gastronomy tourism, and rural tourism) should be promoted.

To summarize, tourism in Al Quds, despite its basic and structural problems, is a promising field that has the potential to be in an important position worldwide in the future provided that simple and decisive steps are taken. In this framework, tourism has the opportunity to recover and improve much faster if all actors act together. Palestinian tourism professionals have managed to overcome many big troubles throughout the history and have gained strength with these experiences. Moreover, the COVID-19 outbreak which affected whole 2020 not only introduces major problems and brings both the economy and tourism to a standstill, but also

³²⁵ A commonly used term for organising free trips to representatives of tourism industry to introduce attractions in a location. Short for familiarisation trips

offers opportunities for industry actors to implement structural transformations. Therefore, with the restructuring and transformation of Al Quds tourism, both economic and socio-cultural positive impacts would increase and spread into the community. Consequently, it would first contribute to the Palestinian people and then to the region making it a more livable area. Briefly, when the findings of the analysis and of the interviews are overlapped, the multicultural atmosphere of Al Quds, the hospitable people and the unique cultural values come to fore, while the necessity of providing quality, differentiated and diversified services take prominence. In this context, the Vision and Mission of Al Quds DMO are proposed as below and the activities/projects, important to achieve the vision and to realize the missions, are expressed in Table 28.

VISION:

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

MISSION:

Assuring that Al Quds provides quality experiences for visitors 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 quality of life for all Palestinian citizens and stakeholders of the community.

Table 28 Principal activities/projects to improve Al Quds Tourism.

BUILDING SUSTAINABLE and CONSTANT FINANCIAL RESOURCES with the help of international organizations
Lifeline financial support (grant and/or loan) to eliminate the economic damages of COVID-19 pandemic and to prepare businesses to post-COVID period.
FOUNDATION of TB
Defining and determining the proper status (union, association, etc.) in accordance with the legislation
Informing partners through websites, newsletters, social media
Conducting workshops, focus group meetings etc. to involve and to encourage partners/actors to join
Starting to operate after the elective general assembly
DEVELOPING a WEB PORTAL listing the Al Quds tourism establishments and their services integrated with online reservation and payment systems.
DEVELOPING ALTERNATIVE TOURISM PRODUCTS/ROUTES
Designating the routes/areas for biking, hiking, sightseeing, tracking and camping,
Revitalization of routes implemented in the past, such as Palestinian Heritage Trail and Sufi Trail.
Designation of some historical thematic routes such as Three Hills of Al Quds Route, Track of Salah-Al Din, and Trace of Ottomans prepared for Muslim tourists travelling for religious purposes. Likewise, organization of tourism packages with special activities and prices to stimulate domestic tourism.
Designation of some joint packages/programs for religious motivated Muslim tourists (for example Al Quds and Mecca tours as "the trail of "ascension")
Designation of recreational tours to other Palestinian cities but also joint recreational tours with Jordan and Egypt.
Designation of some mundane routes related to local myths, international renowned books, films (such as O Jerusalem by Larry Collins and Dominique Lapierre, Jerusalem by Pierre Loti or Jerusalem: Chronicles From The Holy City by Guy Delisle)
Focusing on increasing the contact of tourist with locals by organizing packages including farming, olive picking, visiting refugee camps, etc.,
Designing and organizing programs such as half-day walks around Al Quds, archaeological tours to other cities, participation in local weddings, practicing Palestinian dances/cuisine for foreign mission officials and employees of international organizations
Having workshops with culture, nature tourism agencies and developing products and services in line with their expectations.
Designating the activities related with local culture like cooking, folk dancing, handcrafts, camel rides, migration routes of Palestinian nomads
Designing/programming some activities especially in the night times (painters, local dancers and musicians or theatre shows as well as one day or half day excursions around Al Quds) (For example, shows about / related to Arabian Tales of the One Thousand and One Nights, the Palestinian traditional entertainments, Christmas night show is in December)
Mapping/scheduling the cultural activities all around the year
RENOVATING THE ACCOMMODATION and F&B FACILITIES
Setting the service standards for accommodation, F&B, souvenir shops, etc.
Designation and implementation of a grant program aiming improving physical quality of facilities. <i>(As a start point, the accommodation facilities may get USD 100.000– 150.000 while the F&B facilities would be financed USD 40.000– 50.000 per project.)</i>
INCREASING THE CAPACITY and VARIETY of FACILITIES
Designation and implementation of a grant program aiming establishment of new "authentic" facilities. For example, new accommodation facilities (if possible under international brands), new cafes, patisseries, restaurants local entertainment places (especially around Salah Al-Din Street)

Encouraging and helping existing hotels to apply for building permits to increase the number of rooms

Encouraging and supporting rent-a-car companies to operate

IMPROVING THE SOUVENIR SECTOR

Contest for creative and innovative traditional products to offer as souvenirs

Training the craftsmen to increase and utilize their knowledge and talent, in line with demand of tourists

Designation and implementation of a grant program to support souvenir shops and craftsmen *(The support limit should vary depending on the nature, creativity of the projects to transform the sector. In this context, it would be appropriate to examine the products and projects by a jury including international experts.)*

TRAININGS and INCREASING AWARENESS

Technical Trainings

Training of current staff (of accommodation, F&B facilities, travel agencies)

Language courses initially German, Indonesian, Polish, Ukrainian, Chinese and Russian

Technical courses to increase the service quality ((about housekeeping, food and drink service)

Basic computer skills and competency in software used in the tourism sector

Traditional cooking methods of local dishes

Communication and customer relations

Training of managers

Human resource management

Leadership,

Motivation,

Governance techniques,

Participation,

Financial management

Time management

Customer relations management

Development methods for marketing and sales

Training courses for tourist guides (cooperation should be built among tourist guide unions with their counterparts in other countries such as Austria, England, Germany, Turkey)

Language courses initially German, Indonesian, Polish, Ukrainian, Chinese, Russian, and Turkish

Trainings to update and to deepen the information about tourist sites and Palestinian history

Trainings about Israeli legislation system

Searching/building international partnership to enable trained staff to make practices in well-developed destinations

Trainings for executives about "modern" tourism demand and especially to meet the requirements of post-COVID-19 period.

Cooperation with universities to refresh the curricula/syllabi to keep up with the current conditions

Building or being member of international student exchange programs	
Awareness programs/courses	
Local people about the importance of tourism	
Palestinian culture, cuisine and attractions	
Legal responsibilities and rights	
Local tradesmen	
Transporters (Taxi drivers, tour bus drivers)	
AESTHETICAL IMPROVEMENTS of URBAN SPACES	
Initiatives/efforts to make Jerusalem Municipality to collect garbage more regularly	
Organizing trainings and awareness programs for local tradesmen and people to keep urban spaces clean	
Designating programs to award/certificate the enterprises keeping their business and environment clean	
MARKETTING and PROMOTION	
Promotional activities focusing on	
• "Image renewal/correction"	(in the short term)
• Emphasizing the religious/cultural importance and proximity to other travel destinations	(in the medium term)
• Diversified tourism types such as ecotourism, culture tourism, congress tourism, gastronomy tourism, and rural tourism)	(in the long term)
Lobbying to facilitate border formalities and access of visitors (especially from Arab and Muslim countries) to Al Quds	
Attending the international renowned fairs and exhibitions	
Lobbying activities and "Fam Trips" towards public officers	
In UNESCO and other important cultural institutions about tangible and intangible "Palestinian identity and culture"	
In the countries recognizing Palestine	
Preparing up-to-date promotional documents in current and target market languages	
Preparing "Info/Fam Tours"	
for representatives of international media	
for tour operators/travel agencies operating in the current and target markets	
for celebrities	
Contact with a celebrity to be "Volunteer ambassador" of Al Quds/Palestine	
Efforts to get more acceptance of sites into UNESCO World Heritage List	
COLLECTING UP-DATE, PROPER and RELIABLE STATISTICS for tourism in Al Quds	
CONDUCTING LOCAL and INTERNATIONAL RESEARCH TO IMPROVE THE CURRENT SITUATION and TO KEEP UP WITH THE TRENDS	



10. Conclusion

Although there are major restrictions for utilising the tourism potential of Al Quds to the maximum extent, there is room for improvement and the stagnation of business due to COVID-19 pandemic may have introduced a good opportunity for reviewing and restructuring tourism related strategies and structures in Al Quds.

The main conclusion of the needs analysis is the need for transforming ATHC into a DMO structure that will coordinate efforts to improve the quality of services and to carry out marketing activities. The DMO should also act as an informal regulatory body to mediate conflicts between businesses and institutions, and to maintain physical and organisational infrastructure and facilitate investments. Value chain analysis and the benchmarking study also supported this conclusion.

It is recommended that the DMO for Al Quds, namely the Tourism Board should become operational immediately together with plans for allocating financial resources. It is foreseen that international financial support should be provided at least during the first 5-years. The basic objectives of the DMO can be listed as:

- To strengthen cooperation among businesses while increasing the variety of products and services to increase the benefits of tourism,
- To liaise with public institutions to coordinate individual efforts (especially in times of crisis) and protects visitors,
- To improve tourism product/service quality and destination image, and entrepreneurial culture and create socio-economic positive impacts,

- To establish mechanisms for ongoing activities to develop human resources, and to improve the skills of employees in all types of tourism businesses,
- Conducting research to understand market demands, current supplies of the destination, and to address the gaps through planning and programs,
- Acting as an “economic driver” to generate new income, employment opportunities contributing to a more diverse local economy,
- Seeking effective and efficient financial resources and venture capital opportunities,
- Destination marketing to transmit the most appropriate destination image, and to promote tourism attractions and facilities to target markets.

The structure of DMO in Al Quds is proposed to be participative as widely as possible and to be managed professionally. A proposed structure is given in this document. The performance of the professional managers should be monitored against a set of performance indicators which are also listed in this report.

The intervention areas/topics and relevant actions to be implemented are summarized below.

Creating alternative **financial resources** and funds to enable businesses to access finance for improvement of facilities and for development of the variety and quality of their services. In cooperation with institutions such as PIPA and PalTrade, the TB should encourage the entrepreneurs to invest in Al Quds and/or to establish partnerships with tourism businesses in Al Quds.

Planning and implementing **branding** campaigns for the destination. Building a brand as a “friendly, safe, comfortable, affordable and versatile, and at the same time unique and spiritual destination having a remarkable history and atmosphere” is very important for the development of tourism. Since brands are created by and with powerful people and partners the TB should identify and engage individuals or organizations in branding.

Diversification of tourism activities. The fact that tourism in Al Quds is largely based on religious motivations, imposes extreme seasonality problems and leads to a massive under-utilization of available capacities therefore curbing investment and growth. Diversified tourism will ensure that the activities are spread over wider time periods and will enable local people to have more income from tourism. In addition, it will lead to connecting locals and the visitors that will help Al Quds to open up to the world, and to improve her image. Diversification of activities may also include performances such as street art, painting, dancing, and recitals including folk music and folk dances, introducing new travel programs, such as one day or half day excursions around Al Quds designed around in different themes (love, a novel, Arabian Tales of the Thousand and One Nights, etc.) and revitalization of the existing ones. In order to increase stays in Al Quds it is also necessary to introduce new activities or extend the services to late evenings.

Targeting **new markets** especially those in Asia having Muslim population such as Singapore or Kazakhstan, Turkmenistan, Uzbekistan, which have a higher chance of obtaining visas from Israeli authorities. Similarly, Muslim and Christian citizens of countries such as USA, United Kingdom, France, and Germany that do not need a visa to enter Israel should be focused. Aggressive promotion campaigns should be organized in Asian countries, which are increasingly becoming important markets in world tourism. These markets carry high potential for the tourism in Al Quds.

Preparing **promotional documents** that can attract new clients and that can be accessed both in print and online in the languages of the current and main target and emerging markets. A map of attractions and a calendar of events should also be prepared among these documents.

Organizing promotion campaigns for changing the negative perception of **safety and security** for Al Quds and Palestine. A message highlighting the existence of friendly and hospitable people in addition to cultural, historical and religious heritage, cuisine, traditions and arts and touristic activities should be conveyed. Such efforts should focus on the inclusion of Palestine and Al Quds into "safe places" in the travel warnings of countries to their citizens. For this purpose, **lobbying and info tours** for government officials should be intensified.

Nomination of more Palestinian sites in the **UNESCO World Heritage List**. The list provides free marketing and a sense of credibility to both the listed area and the entire destination. Moreover, although it needs funding, the info tours/**Fam trips** would be beneficial to raise awareness of both the international community and tour operators, as well as for opinion leaders, artists, journalists and industry representatives, Fam tours can be organized for celebrities, and as in the case of India, a globally known person can be selected as a volunteer ambassador of Palestine/Al Quds.

Participation in internationally renowned and specialized **fairs** and conventions, congresses which will introduce marketing and lobbying opportunities. Faith Travel Association, International Catholic Stewardship Council, Mid Atlantic Congress, Evangelical Lutheran Church in America, National Organization for Continuing Education of Roman Catholic Clergy can be mentioned as examples for associations to get in contact.

Opening **recreation areas** and attractions not only for tourists but also for local people since it is noted that a significant number of greenfield visitors live in the region.

Improving **public transportation** with environmentally friendly vehicles and taxis. Also, bicycles or other personal vehicles such as electric scooters should be utilized as a means of transportation in historical districts and their surroundings. Moreover, there should be more and diversified transportation options to attractions, other cities in Palestine, and to Jordan. Rental car services should be improved as Israeli rental companies do not allow vehicles to enter the Palestinian territories.

Encouraging **renovation** of old facilities without damaging their historic and cultural identity in order to meet international service standards. In addition to facilities, the need for renovation, public spaces should also be addressed. Idle buildings in the Old City can be used as exhibition spaces or museums.

Documentation and mapping of historical, cultural, and religious assets and installation of **signages** about historic/religious sites and other cities.

Production of **souvenirs** that are made from regional and natural materials available on site, having reference to the destination, or a point of interest in the destination. Sustainable souvenirs do not only have ecological, but also social and economic dimensions. These souvenirs should trigger positive emotions among buyers and recipients. An attractive range of souvenirs that suits the destination increases credibility and increases the satisfaction of visitors who prefer to buy souvenirs with a real local connection. Sustainable souvenirs based on traditional crafts or referring to a local tradition also help to strengthen cultural identity.

Training of tourism professionals, business managers and owners as well as any individual who will interact with tourists will serve for the improvement of quality of tourism services. This is a pre-requirement for staying competitive in the world tourism market. In addition to professional training, awareness raising in the cleanliness and hygiene is also important. When planning training courses, the expectations and requirements of new markets (especially East Asia) should be taken into account, explaining different and diverging needs of the tourists coming from this market, teaching basics of their language (e.g., Chinese/Korean/Japanese), or cooking their favorite food or arranging traditional cuisine to their taste.

Organization of campaigns among tourism staff and general public about keeping the city and the facilities clean.

Serving local food by encouraging F&B facilities to include more local cuisine in their daily menus. In this context, to ensure satisfaction in the quality and presentation of the meals, the staff should be trained in authentic cooking techniques of local dishes as well as presenting food in an attractive manner.

Launching **online booking** sites increasing the attractiveness of hotels, restaurants and tourist markets in the Old City and its neighborhoods. All tourism facilities should improve the quality and content of their websites and be more creative and innovative to attract visitors. Beyond updating websites and providing satisfying and accurate information, it is also important to implement online reservation and payment systems. Businesses should also be parts/members of international reservation systems. TB can operate a portal with a secure booking and payment system. The portal should act as a medium to share experiences and how misconceptions have changed after visiting, by utilizing videos of tourists, blogs, social media pages, etc.

Increasing visibility in **social media** which presents tools that make communication interactive and quickly accessible around the world. Business establishments need to diversify communication tools by developing social media presence.

Increasing the **sense of "ownership"** in the field of tourism among local people. The local communities in Al Quds should understand that the improvement of tourism will be beneficial for all. They should be encouraged to participate in tourism activities, and it should be ensured that they will get their share of the benefits. Even a small benefit will increase their interest in and support towards tourism.

Aggressive **lobbying** to facilitate border formalities and access of visitors, especially those from Arabic and Muslim countries to Al Quds. This is a task that must be undertaken not only by public officials but also by the real owners of the sector.

It should be kept in mind that **cooperation with other destinations** regarded as competitors can also be necessary and beneficial. In terms of tourism, Jordan and Israel are not only competitors but also important means of attracting tourists. Those who visit Jordan often visit Israel or most of the tourists visiting Israel come to the Old City of Jerusalem. Therefore, coordination, particularly with Jordan and introducing new routes for example, Al Quds and Mecca and/or Al Quds and Egypt will target bigger markets rather than competing in smaller ones.

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Annexes

Annex 1 Questionnaire Form

Dear Madam/Sir,

Together with relevant stakeholders, the Ministry of Tourism and Antiquities of Palestine is taking actions for improving quality of tourism infrastructure and services in Jerusalem/Al-Quds.

You are kindly invited to fill in a survey provided in the link below. It will not take more than 15 minutes of your time and will provide valuable information for our understanding of your experience.

This survey is only for deriving statistical information. Your personal data will not be compiled and your individual responses will not be shared with third parties.

Your sincere and full responses are highly appreciated.

Project Team

"Analyzing the Tourism Infrastructure and Developing a Tourism Destination Road Map for Al-Quds" project is financed by COMCEC and implemented by the REGIO-ATC Consultants consortium.

DEMOGRAPHIC QUESTIONS

Gender ☐ Female ☐ Male

Age :

Country of residence :

Marital status ☐ Single ☐ Married

Educational status ☐ Untutored ☐ Primary school ☐ Secondary school ☐ High school
☐ Associate degree ☐ Bachelor ☐ Master– Doctorate

Occupation ☐ Unemployed ☐ Student ☐ Retired ☐ Civil Servant
☐ Public officer ☐ Wage employee ☐ Self-paid ☐ Employer
☐ Other (Please specify)

Average Monthly income : (please indicate currency)

When did you last visit Jerusalem/Al Quds?

☐ I never visited Jerusalem/Al Quds? ☐ In the last five years
☐ More than five less than ten years ago ☐ More than ten years ago

Purpose of visit ☐ Religion and Pilgrimage ☐ Recreation and Holidays ☐ Visiting Relatives/Friends
☐ Business ☐ Medical Treatment ☐ Training/Education
☐ Other (Please specify)

How long did you stay in East Jerusalem ☐ Did not stay (daily visit) ☐ Overnight ☐ Two nights or more

Have you stayed in West Jerusalem also? ☐ Yes ☐ No

Considering your visit to East Jerusalem, please indicate your opinions about the statements below	Definitely disagree	Mostly disagree	Slightly disagree	Neither agree, nor disagree	Slightly agree	Mostly agree	Definitely Agree
There were many attractive natural sceneries							
There were many and interesting historic places to visit							
Historic sites were easily accessible							
Natural attractions were easily accessible							
During my visit, I contacted with the local people							
Palestinian culture/customs were very attractive							
Palestinian people were very friendly							
During my visit, I experienced local food							
Palestinian local cuisine was very appealing							
Public spaces were attractive							
Quality of urban infrastructure was good							
Local transport was well organized							
East Jerusalem was clean							
East Jerusalem was safe							
There were many open-air (outdoor) activities to join and enjoy							
There were many attractive fairs, festivals and exhibitions to attend							
The number and quality of museums were satisfactory							
There were diversified shopping opportunities							
The shops were open when I wanted to shop							
The shops offered a wide variety of goods							
Nightlife/entertainment opportunities were satisfactory							
Sport opportunities and facilities were satisfactory							
Direction signs to show the attractions, facilities and activities were clear and helpful							
It was easy to access to information about the attractions that I am interested in							
The accommodation facilities attractive decoration and were well equipped							
The accommodation facilities were clean and hygienic							
Staff of the accommodation facilities were courteous							
Staff of the accommodation facilities were qualified							
The accommodation facilities had user-friendly online reservation system							
Web-site of accommodation facilities provide in-depth information							
Web-site of accommodation facilities seemed trustworthy regarding online payments							
The food and beverage facilities attractive decoration and were well equipped							

Considering your visit to East Jerusalem, please indicate your opinions about the statements below	Definitely disagree	Mostly disagree	Slightly disagree	Neither agree, nor disagree	Slightly agree	Mostly agree	Definitely Agree
The food and beverage facilities were clean and hygienic							
The food and beverage facilities offer a wide variety of dishes and refreshments							
The food and beverage facilities offer a good variety of local cuisine							
The quality of the food was satisfactory							
The food and beverage were reasonably priced							
The staff of food and beverage facilities were courteous							
Staff of food and beverage facilities were qualified							
Travel agencies provided qualified services							
Travel agencies provided in-depth and satisfactory information							
My visit to East Jerusalem was exciting							
Overall, I am satisfied with my experience in East Jerusalem							
I intend to revisit East Jerusalem							
I intend to recommend East Jerusalem to my friends and relatives							

According to you, what need to be improved in East Jerusalem?

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Annex 2 Results of Regression Analysis

Dependent Variable	Predictor(s)	R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics					Durbin - Watson	ANOVA		Standardized Coefficients		
						R Square Change	F Change	df1	df2	Sig. F Change		F	Sig.	Beta	t	Sig.
My visit to East Jerusalem was exciting	During my visit, I experienced local food	0.607	0.369	0.340	0.670	0.369	12.850	1	22	0.002	2.045	12.850	0.002	0.607	3.585	0.002
Overall, I am satisfied with my experience in East Jerusalem	Public spaces were attractive	0.678	0.460	0.435	0.527	0.460	18.735	1	22	0.000	1.499	18.735	0.000	0.678	4.328	0.000
	Public spaces were attractive	0.780	0.608	0.570	0.460	0.148	7.914	1	21	0.010		16.268	0.000	0.467	2.993	0.007
	The food and beverage were reasonably priced													0.439	2.813	0.010
I intend to recommend East Jerusalem to my friends and relatives	There were many and interesting historic places to visit	0.514	0.265	0.231	0.956	0.265	7.912	1	22	0.010	1.566	7.912	0.010	0.514	2.810	0.010

Annex 3 Service types provided by HLITOA members

Tour categories	Numbers of Agencies	Tour categories	Numbers of Agencies	Tour categories	Numbers of Agencies
Faith and spiritual (general)	26	FIT travel (general)	20	Events	7
Christian pilgrimage	25	Masar Ibrahim	11	Meetings	7
Mass arrangements	23	Hiking tours	10	Incentive arrangements	5
Christmas in Bethlehem	22	Biking tours	7	Study tours	10
Meetings with Parishes	20	Camping	6	Youth travel	10
Baptism arrangements	18	Off –road & safari tours	4	Domestic local tourism	4
Islamic Pilgrimage	18	Culinary tours	11	Diaspora programs	9
Spiritual Retreats	17	Snorkeling & diving	3	Experiential tours	9
Denominational Tours	15	Eco – tourism & Nature	12	Fact Finding Missions	9
Choir Travel Arrangements	11	Olive harvest	9	Sun & Beach	8
Wedding in Cana	2	Bird watching	3	Special Needs Travel	7
Cultural Tours	21	Wild – life watching	3	Dual – Narrative Tours	6
Group travel (general)	21	Agricultural	1	Pilgrimage	5
Historical and archaeological tours	21	Paragliding, hot – air balloon	3	Delegation Travel Arrangements	9
Family tours	20	MICE (general)	11	Christian holiday	1
Adventure and sport travel	12	Conference & conventions	8	Therapy treatment	1
Luxury travel	15				

Additional services

Tour categories	Numbers of Agencies	Tour categories	Numbers of Agencies	Tour categories	Numbers of Agencies
Accommodation	26	Outgoing tours	8	Transport	24
Air Fares & Tickets	9	Car rental	14	Visa assistance	16
Group Ticketing	10	White Label operations	9		

Source: HLITOA (2020)

Annex 4 Agents registered in HLITOA, travelpalestine.ps and PSTTA

No	Memb.	Name of agents	Base	No	Memb.	Name of agents	Base
1	2	Abeer Tours & Travel Co	Bethlehem	35	2, 3	Anastasis Tours	Bethlehem
2	2,3	Abu Alhalawa for Tourism	Ramallah	36	1, 2, 3	Angels Tours & Travel	Bethlehem
3	2	Adventure Travel & Tourism Co.	Al-Ram	37	2, 3	Anwar Tours & Travel Agency	Ramallah
4	1	Aeolus Tours	East Jerusalem	38	2	Apolio For Travel & Tourism	Ramallah
5	2	Agenda for Travel & Tourism Co	Jenin	39	2	Arak For Travel & Tourism Co	Nablus
6	2	Aisha & Partners Tours & Travel Co.	Nablus	40	2, 3	Arseema Travel & Tourism Co	Ramallah
7	2,3	Al Afaq Travel	Hebron	41		Atic Tours & Travel	East Jerusalem
8	2	Al Alnas Travel & Tourism Co	Hebron	42	2, 3	Atlas Tours & Travel co. Ltd	Ramallah
9	2	Al Arrab For Travel	Hebron	43	1	Awad & Co Tourist Agency Ltd.	East Jerusalem
10	2,3	Al Asmar Travel Agency	Ramallah	44	2	Awaen for Travel & Tourism Office	Qalqilya
11	2	Al Azhar Travel Office	Nablus	45	2	Aya Katerina Travel & Tours	Bethlehem
12	2,3	Al Badawi Travel & Tourism Co.	Tulkarm	46	1	B. Peace Tours and Tarvel	East Jerusalem
13	2	Al Etimad For Tourism & Travel	Nablus	47	2	Beit Sahour Tours & Travel Co	Bethlehem
14	2	Al Faisal for Travel & Tourism Office	Tulkarm	48	2	Best Tours Travel & Tourism	Ramallah
15	2	Al Farouq Travel & Tourism Office	Nablus	49	2, 3	Bethlehem Star Travel & Tourism	Bethlehem
16	3	Al Joulany Travel	Hebron	50	2	Blue Star For Travel Co.	Hebron
17	2	Al Karmel Tours and Travel	Ramallah	51	2	Bonjour Travel & Tourism Co	Jenin
18	3	Al Kiram Travel Co.	Hebron	52	3	Carawan Tours	East Jerusalem
19	2	Al Madina For Travel Co	Nablus	53	1, 2, 3	Crown Tours & Travel	Bethlehem
20	2	Al Majd Tours & Travel Co	Ramallah	54	1	Dakkak Tourists Agency	East Jerusalem
21	2,3	Al Raed Tours & Travel Co.	Hebron	55	2, 3	Damas Holidays Travel & Tourism Co	Ramallah
22	2	Al Rayes Travel & Tourism Co.	Nablus	56	2, 3	Darwish Tourist & Travel Agency	Ramallah
23	2,3	Al Sadeq Travel & Tourism Co	Jenin	57	1	Destination Middle East	East Jerusalem
24	2,3	Al Samer Travel Agency	Ramallah	58	2, 3	Diwan Voyage for Tourism Co.	Ramallah
25	2	Al Sultan Tourism & Travel Co.	Nablus	59	2	Dolphinario Tourism & Travel Co	Ramallah
26	2	Al Tahadi Travel Co.	Nablus	60	2	Donna For Travel & Tourism Office	Bethlehem
27	2	Al Tar Tours	Bethlehem	61	2	Dubai Tours For Travel Co.	Nablus
28	2	Al Zaytonah For Tourism & Travel Co	Ramallah	62	2, 3	East Wind Tours & Travel Co	Bethlehem
29	2	Al-Adam For Travel & Tourism & Haj & Umrah Co.	Ramallah- AlBireh	63	2, 3	Easy Way Travel & Tourism Co	Ramallah
30	2	Al-Ayesh For Travel & Tourism Co.	Hebron	64	1	Epic Tours	East Jerusalem
31	1	Albina Tours	East Jerusalem	65	2	Eshbelia Travel & Tours	Nablus
32	1,2	Alternative Tourism Group (ATG)	Bethlehem	66	2	Every Where For Travel & Tourism Co	Jenin
33	2	Alzeer Mike Company for Travel & Tourism	Hebron	67	1	Faternum Tours Ltd.	East Jerusalem
34	2,3	Amani Travel Co.	Ramallah	68	2	Fatima Tours & Travels	Bethlehem

Annex 4 Agents registered in HLITOA, travelpalestine.ps and PSTTA (continued)

No	Memb.	Name of agents	Base
69	2	Fifth Gospel Travel & Tourism Co	Bethlehem
70	2, 3	Firas Tours & Travel	Nablus
71	2	First Travel & Tourism Co.	Hebron
72	2	First Trinity Pilgrimage Tours	Bethlehem
73	2, 3	Four Seasons For Tourism & Travel Co	Bethlehem
74	1	GEMM Travel Holy Land	East Jerusalem
75	1	George Garabedian Co. Tourist and Travel Bureau	East Jerusalem
76	2	Gloria Tours & Travel Agency	Bethlehem
77	1, 2	Golden Gate Tours & Travel	Bethlehem
78	1, 2, 3	Golden Globe Tours & Travel Co	Ramallah
79	2	Grace Tours	Bethlehem
80	2	Green Line Travel	Hebron
81	1, 3	Guiding Star Ltd.	East Jerusalem
82	2, 3	Hittin Tours & Travel Co.	Nablus
83	1	HLA Holy Land Adventure Tours	East Jerusalem
84	2	Hla Tours (Holy Land Adventure)	Bethlehem
85	2	Injaz Tourism Co	Ramallah
86	3	Isis Travel & Tours	Ramallah
87	2	Ivvras Al Falastini Travel & Tourist Agency	Ramallah
88	2	Iya Travel, Tourism, Hajj and Umrah Co.	Qalqilya
89	2	Jaffra for Tourism & travel Co	Hebron
90	2	Jala Travel & Tourism Office	Bethlehem
91	1	Jerusalem T&T (JT&T) Ltd.	East Jerusalem
92	1	JIT Tours and Travel	East Jerusalem
93	3	Jiro Tours	East Jerusalem
94	2	Josor for Travel & Tourism Co.	Tulkarm
95	2	Joy Pilgrims Tours & Travel Office	Bethlehem
96	2	Jury for Travel & Tourism	Nablus
97	2	Kanaan Travel & Tourism	Ramallah
98	2, 3	Kashou Travel & Tourism Agency	Ramallah
99	2, 3	Kayed Tours & Travel	Nablus
100	2, 3	Khalifa Tourist & Travel Co.	Nablus
101	2, 3	Laila Tours 4 Travel	Bethlehem
102	1	Laila Tours and Travel	East Jerusalem

No	Memb.	Name of agents	Base
103	2, 3	Lama Tours International Inc.	Bethlehem
104	1, 3	Lawrence Tours & Travel co. Ltd	East Jerusalem
105	2	Leaders For Tours & Travel Co.	Nablus
106	2	Leaders for Tours & Travels Hajj & Umrah Co.	Ramallah- AlBireh
107	2	Lemor Travel & Tourism Co	Hebron
108	1	Lions Gate Travel & Tourism	East Jerusalem
109	1, 3	Lourdes Tourist & Travel Agency	East Jerusalem
110	2	M I Tours	Bethlehem
111	2	Madian Tours & Travel Co. Ltd	Bethlehem
112	2	Marah For Tourism & Travel	Ramallah
113	2	Mardawi For Marketing and Investment Co,	Salfeet
114	3	Masri International Aviation Agency	Nablus
115	2	Miles Travel & Tours	Nablus
116	2	Mohammed Rajoub & Partners for Tourism Co.	Hebron
117	2	Mohand Al Ja'bari Travel Office	Hebron
118	2	Morning Travel & Tourism Co.	Hebron
119	1	Mount of Olives Tours	East Jerusalem
120	2, 3	Mrebe Tours & Travel	Ramallah
121	3	National Tourist Office "Al-Shurafa"	Gaza Strip
122	1	Nativity Tours	East Jerusalem
123	3	Nativity Tours & Travel Co.	Bethlehem
124	1	Nawas Tourist Agency Ltd-Jerusalem	East Jerusalem
125	1	Nazarene Tours	Nazareth
126	1	Net Tours	East Jerusalem
127	2	Noor Al Fajr Travel & Tourism Office	Hebron
128	1	O.S Tours & Travel	East Jerusalem
129	2	One Travel For Travel & Tourism	Hebron
130	2	Orange Tours For Travel & Tourism Co.	Salfeet
131	1	Overseas Travel Bureau (O.T.B) Ltd	East Jerusalem
132	2	Pal Million Travel & Tourism	Hebron
133	2	Palcom Travel For Tourism & Travel Co.	Nablus
134	2, 3	Palestine Travel Agency	Ramallah
135	3	Paltour for Tours & Travel	Ramallah
136	2	Pax Travel & Tourism Co.	Hebron

Annex 4 Agents registered in HLITOA, travvelpalestine.ps and PSTTA (continued)

No	Memb.	Name of agents	Base
137	1	Petrologos Tours Ltd.	East Jerusalem
138	2	Phoenix Travel & Tourism Co. Ltd	Hebron
139	2	Pilgrims Angels Tours & Travel Co.	Bethlehem
140	3	Planet Travel & Tours	Ramallah
141	2	Platinum Tours & Travel	Bethlehem
142	1	Premium Global Tours Ltd.	East Jerusalem
143	1	Priority Travel & Tours	East Jerusalem
144	2	Pro Adventure Travel Office	Ramallah
145	2	Qatar For Qatar Hajj and Umrah Co	Hebron
146	2	Quest Tours & Consultancy Co.	Ramallah
147	2,3	Raha Tours & Travel Ltd Co	Ramallah
148	2,3	Rahal Al Jadeed For Travel Co	Ramallah
149	2	Rehle Travel Agency	Ramallah
150	2	Rio Tours & Travel Co.	Ramallah
151	2,3	Riviera Tours & Travel	Jenin
152	2	Rizy Travel	Jericho
153	2	Roots For Tourism & Travel Co.	Nablus
154	2	Royal International Tourisam & Investment	Ramallah
155	3	Royal Tours & Travel	Ramallah
156	2	Ruba & Partners Travel Co	Nablus
157	2,3	Salah Travel Office	Ramallah
158	2,3	Sama Travel	Ramallah
159	2	Samar Tours Travel & Tourism Co	Ramallah
160	1	Samara Tourist & Travel Agency	East Jerusalem
161	2	Sansur Travel & Tourism Agency	Bethlehem
162	2	Sham Travel & Tourism Co	Jenin
163	3	Shbat & Abdelnour Travel Agency	Ramallah

1. HLITOA, 2 travvelpalestine.ps, 3. PSTTA

No	Memb.	Name of agents	Base
164	1, 3	Shepherds Travel & Tourism	East Jerusalem
165	2	Shireen Tamimi Tours	Hebron
166	2	Siraj Çenter	Bethlehem
167	2	Smart Tours	Ramallah
168	2	Speed Shipping, Travel & Tourism Agents Co.	Ramallah
169	1	Steps Tours Ltd.	East Jerusalem
170	2	Sun & Sea Tourism & Travel Co.	Bethlehem
171	2	Sunbird Travel & Tours Co	Bethlehem
172	1, 2	Terra Sancta Tourist Co	Bethlehem
173	2	The Arab Office For Travel & Tourism	Ramallah
174	1	Theodorie Tours and Services	East Jerusalem
175	2, 3	Top Tours	Nablus
176	2, 3	Travel House For Travel & Tourism Co	Ramallah
177	2	Travel Point for Travel & Tourism Co.	Tulkarm
178	3	Trust Travel	Ramallah
179	2	TTT Tanit for Tourism and Travel Co	Bethlehem
180	1	Universal Tourist Agency	East Jerusalem
181	1	Via Emmaus Tours	East Jerusalem
182	2	Visa Travel & Tourism Co.	Tulkarm
183	2	Welcome Tours & Travel	Bethlehem
184	3	West Bank Tours & Travel	Bethlehem
185	2	White Shark Tours	Nablus
186	1	William Tours	East Jerusalem
187	2, 3	Zaatarah & Partners Agency Co	Ramallah
188	1	Zaatarah Tours & Travel	East Jerusalem
189	2, 3	Zeina Holidays for Travel	Ramallah
190	2, 3	Zorbas Travel Show Tourism & Travel	Nablus

Annex 5 Media Organizations in Palestine

Palestine Based Media	Saudi Television	Freelance	Japanese News Agency
Al Kitab - TV	Oman TV	CNN	Independent TV News
Al Quds - TV	Nile TV International	Associated Press-AP	The Guardian (UK)
PPBC- Radio TV	MBC	Rheinfalz	Frankfurter Rundschau
Salam TV	Al-Manar TV	The Media Line	Frankfurter Allgemeine Zeitung
Wattan TV	Kuwaiti Television (KTV)	Press TV (English)	France 2
JMCC- Internet	Jordan TV	Radio France	Fox News (US)
Palestine Chronicle - Internet	Al-Jazeera	New York Times	Foreign Press Association
Palestine Information Center - Internet	Al-Ikhbariya Syria TV	De Telegraaf	Financial Times (UK)
Palestine Journal - Internet	Dubai Television	GRC (Mexico)	DPA-German Press Agency
Palestine News Network - Internet	BBC Arabic	Yomiuri Shimbun (Japan)	Die Zeit
Al Hourriah - Magazine News Media	Al-Aan TV	CCTV	Die Welt
Al Ayyam - Newspaper	Israeli	Deutsche Welle (DW)	Der Spiegel
Al Hayat Al Jadidah - Newspaper	The Jerusalem Post	ZDF (German TV)	Radio COPE (Spain)
Al Quds - Newspaper	Reshet	Washington Post	CBS News (US)
Al Arabi - Newspaper	Keshet	TVE- Spanish TV	CBC News (Canadian)
Ma'an News Agency	Kan TV & Radio	TRT (Turkish TV)	Sky TV
WAFA News Agency	Israel Television	Russia Today	BBC
Al Aqsa - Radio TV, Gaza City	Yediot Ahronot	Reuters (UK)	ARD (German)
Felesteen - Radio TV, Gaza City	Ma'ariv	Record TV (Brazil)	ANSA - Italian News Agency
Al Manar - Newspaper	Kol Israel (Radio News)	RAI	Agence France Presse (AFP)
Al Ayyam - Newspaper	The Jerusalem Report	Radio Sawa	ABC News (US)
Al Hayat - Newspaper	The Jerusalem Post (daily)	Radio Monte Carlo	
Al Jadidah - Newspaper	Israeli Journalists Association	Radio France - RFI	Palestine Public Broadcasting Corporation - Radio TV
Arab	Ha'aretz – New York Times	ORF TV & Radio (Austria)	Jerusalem Media and Communication Centre - Internet
Al-Arabiya - TV	Government Press Office	NHK TV & Radio (Japan)	
Sky News- Arabia	Galei Zahal (Army Radio)	NBC News	
China TV-Arabic	Censorship Office	National Public Radio	
Al-Alam	International	Il Manifesto (Italy)	
Al-Hurra	TF1 TV	Le Monde (France)	
Al-Ekhabaryeh TV	RTL TV	Kyodo News	
Al-Mayaden TV	NHK TV & Radio	Kurier (Vienna)	

Annex 6 CSO types and names in Palestine

	Associations & Unions (72)		Associations & Unions (72)		Associations & Unions (72)		Environment & Water (30)
1	University Graduates' Union	31	Palestinian Federation of Industries	61	Electric Co. Workers' Union	74	YEDF - NGO Forum Palestine
2	The Union of Stone and Marble Industry in Palestine	32	Palestinian Equestrian Federation	62	Charitable Societies Union-North	75	Al-Mustakbal Society for Development & Environment
3	Union of Parents' Committees	33	Palestinian Economists Association	63	Business Women Forum	76	Water Sector Regulatory Council (WSRC)
4	Union of Palestinian Textiles Industries	34	Palestinian Dental Association- Gaza	64	Association of the Palestinian Revolution's Ex-Warriors (APRE)	77	The Center for Environment - Palestine (CEP)
5	Union of Palestinian Pharmaceutical Manufacturers (UPPM)	35	Palestinian Dental Association	65	Association of Palestinian Local Authorities (APLA)	78	Rural Center for Sustainable Development (RCSD)
6	Union of Jerusalem Graduates	36	Palestinian Contractors' Union	66	Association of Palestinian Driving Schools	79	Palestinian Wastewater Engineers Group
7	Union of Clothing Industry, Textile and Leather Industries	37	Palestinian Certified Translators Union	67	Association of Engineers - Gaza Governorates	80	Palestinian Water Training Center
8	Union of Charitable Societies in Hebron	38	Palestinian Businessmen Forum - Hebron	68	Association of Banks in Palestine	81	Juthour Arboretum
9	The Union of Charitable Societies - Jerusalem (UCS)	39	Palestinian Businessmen Association - Gaza	69	Arab Tourist Guides' Union	82	Technology Transfer Association
10	Unemployed Workers' Federation Palestine	40	Palestinian Businessmen Association	70	Arab Hotel Association	83	Auja Eco Center
11	At-Tawfiq Fishermen Cooperative Society	41	Palestinian Boxing Federation	71	Alumni Association of Bethlehem University	84	Youth Network
12	Students' Strife Committees Union	42	Palestinian Bar Association		Chambers of Commerce (15)	85	GREAN (Grass Roots Environmental Action Network) Palestine
13	Shiraa Association for Development	43	Palestinian Association of Certified Public Accounting - PACPA	72	Tulkarem Chamber of Commerce & Industry	86	Water Training - Palestine
14	Safety & Protection Association in the Gaza Strip	44	Palestinian Animal League	73	Tubas Chamber of Commerce, Industry & Agriculture	87	Water & Soil Environmental Research Unit (WSERU)
15	Retired Civil Servants Society - Gaza Strip	45	Palestinian Accountants and Auditors Syndicate	74	Salbit Chamber of Commerce, & Industry	88	Water & Environmental Development Organization (WEDO)
16	Pen Palestine (World Association of Writers)	46	Palestine Physicians Syndicate	75	Ramallah/Al-Bireh Chamber of Commerce & Industry	89	Water & Environment Studies Institute
17	Palestinian Writers' Union	47	Palestine General Federation of Trade Unions	76	Qalqilya Chamber of Commerce & Industry	90	Sunflower Association for Human and Environment Protection

18	Palestinian Union of Social Workers & Psychologists	48	Palestine Auto Mobile Club	77	Palestinian American Chamber of Commerce (AmCham-Palestine)	91	Roads & Environment Safety Center (RESC)
19	Palestinian Society of Tourist & Travel Agents (PSTTA)	49	National Union for Palestinian Non-Governmental Organizations - NUNGO	78	North Hebron Chamber of Commerce	92	Palestinian Ornithology and Biodiversity Society
20	Palestinian Shippers' Council (PSC)	50	Medical Professions Technical Syndicate	79	Nablus Chamber of Commerce & Industry	93	Palestinian Hydrology Group for Water & Environment Resources Development
21	Palestinian Psychiatric Association	51	Jordan Medical Association	80	Jericho Chamber of Commerce & Industry	94	The Palestinian Environmental NGOs Network (Friends of the Earth-Palestine)
22	Palestinian Pharmacists Syndicate	52	Holy Land Incoming Tour Operators Association	81	Jenin Chamber of Commerce & Industry	95	Palestinian Association for Education & Environmental Protection
23	Palestinian Pharmaceutical Association	53	Greek-Orthodox Housing Society	82	Hebron Chamber of Commerce & Industry	96	Palestine Wildlife Society
24	Palestinian Ophthalmic Society	54	General Union of Radio & TV Private Stations - Palestine	83	Gaza Chamber of Commerce & Industry	97	Jerusalem Water Undertaking
25	Palestinian Medical Relief Society (PMRS)	55	General Union of Palestinian Teachers - General Secretariat	84	European-Palestinian Chamber of Commerce	98	Institute of Environmental and Water Studies (IEWS)
26	Palestinian Judo Federation	56	General Union of Palestine Workers (GUPW)	85	Bethlehem Chamber of Commerce & Industry (BCCI)	99	House of Water & Environment
27	Palestinian-Iraqi Brotherhood Association	57	General Union of Cultural Centers	86	The Arab Chamber of Commerce & Industry/Al Quds	100	Environmental Protection & Research Institute (EPRI)
28	Palestinian General Union of People with Disability	58	Federation of Palestinian Chambers of Commerce, Industry & Agriculture			101	Energy Research Center (ERC)
29	The Palestinian General Union of Charitable Societies (PGUCS)	59	Federation of Independent Unions - Palestine			102	Bustan Qaraaqa
30	Palestinian Food Industries Union (PFIU)	60	Engineers' Association			103	Arab Hydrology Group

Source: PASSIA (2020)

Annex 7 Supporter bodies to VisitPalestine

The Jerusalem Tourism Cluster	www.enjoyjerusalem.com
The Holy Land Incoming Tour Operators Association	https://hltoa.com/
The Arab Hotel Association	www.palestinehotels.com
Arab Tour Guides Union	https://arabtourguidunion.wordpress.com/
The Danish House in Palestine	www.dhip.org
Network for Palestinian Experiential Tourism Organization	www.nepto.org
Yabous Cultural Center and the Jerusalem Festival	www.yabous.org
The Artas Lettuce Festival	
The Taybeh October Festival	
The Massar Ibrahmi – Abraham’s Path Initiative	
The Siraj Center	
Open Bethlehem	www.openbethlehemcampaign.org

Source: *visitPalestine.ps*

Annex 8 Institutions in Palestine

Ministries	R&D Institutions	Investment, Financial Consulting & Credit Companies
Women's Affairs	Academic and Research Centers (42)	Palestinian Stock Market
Waqf & Religious Affairs	W.F. Albright Institute of Archaeological Research (AIAR)	Palestinian Monetary Authority
Telecommunication & Information Technology		Palestine Development Fund
Social Affairs	Urban & Regional Planning Unit (URPU)	Kreditanstalt für Wiederaufbau (KfW)
Public Works & Housing	Seventh Day Center	FATEN
National Economy	Palestinian Prisoners Center for Studies	Center for Development Consultancy (CDC)
Labor	Palestinian Forum for Israeli Studies (MADAR)	Green Palestine Investment Company
Justice	Palestinian Council for GREN (Global Ratification & Elections Network)	Palestinian Economic Council for Development & Reconstruction (PECDAR)
Jerusalem Affairs		Atlas Investment Group
The Interior	Palestinian Center for Public Opinion (PCPO)	ACAD for Financing and Development
Information	Palestinian Center for Policy & Survey Research (PCPSR)	The Palestine Exchange (PEX)
Health		Future for Palestine
Foreign Affairs	Palestinian Center for Policy Research and Strategic Studies (Masarat)	Massar International
Education & Higher Education		Al-Wataniah Securities Company
Transportation	Palestinian American Research Center (PARC)	United Securities Company
Tourism & Antiquities	Palestinian Academic Society for the Study of International Affairs - PASSIA	Target Jordan Palestine Securities – El-Hadaf
Local Government		Palestinian Business Women's Association (Asala)
Finance & Planning	Palestine Economic Policy Research Institute (MAS)	Palestinian Housing Council
Culture & Arts		Reef Finance
Agriculture	Palestine Academy for Science & Technology (PALAST)	Asala for Credit & Development Company
Prime Minister's Office		Palestinian Banking Corporation (PBC)
Cabinet Office	Pal-Think - Strategic Studies	Palestine Mortgage and Housing Corporation
	Al-Nawafeth Center for Studies & Researches	Palestine Investment Fund (PIF)
	National Research Center	Palestine Diaspora Investment Company (PDIC)
	The Mattin Group	Palestine for Credit & Development - FATEN
	Al-Mashriq Al-A'amal Center for Cultural & Development Studies	New Farm Processing & Marketing
	Al-Mashriq Al-A'amal Center for Cultural & Development Studies	Mazaya Investment Co.

Annex 8 Institutions in Palestine (continued)

PA Institutions	R&D Institutions	Investment, Financial Consulting & Credit Companies
The Land Authority	Mapping and Geographic Information Systems Department	Palestine Development & Investment Ltd. (PADICO HOLDING)
The Land Authority-Gaza		
General Personnel Council	Arab World for Research & Development (AWRAD)	Mezanco Company for Investment and Development
General Authority for Civil Affairs	The Kenyon Institute (The British School of Archaeology) - Council for British Re-search in the Levant	Al-'Iqaria Trading Investment Company
Palestinian Broadcasting Corporation (PBC)		Housing Council Jerusalem
Environment Quality Authority		Global Securities Company
Palestinian Anti-Corruption Commission (PACC)	Jerusalem Center for Studies and Islamic Media	Al-Etiman for Investment & Development
Palestinian Industrial Estate & Free Zone Authority	Applied Research Institute- Jerusalem (ARIJ)	Bait Mal Al Quds Al-Sharif
Palestine National Archives Center	Israel-Palestine Creative Regional Initiatives (IPCRI)	Arab Palestinian Shopping Centers
Palestine Capital Market Authority	Institute for Public Policies (IPP)	Arab Palestinian Investment Co. (APIC)
State Audit and Administrative Control Bureau	Institute of Policy Studies	Al Quds Holding Company
Palestinian Water Authority	Institute for Palestine Studies (IPS)	Banks
Palestinian Energy & Environment Research Center (PEC)	Health, Development, Information & Policy Institute (HDIP)	Safa Bank
Palestinian Investment Promotion Agency (PIPA)	Al-Hadaf Center for Studies & Information	Palestine Islamic Bank
Palestinian Central Bureau of Statistics (PCBS)	Field Work Team (FWTER)	The National Bank
Palestinian Economic Council for Development & Reconstruction (PECDAR)	Faisal Hussein Foundation	Quds Bank
Palestine Standards Institution	Civitas Institute	Palestine Investment Bank
Palestine News & Information Agency (WAFA)	Center for Political & Development Studies (CPDS)	Jordanian Commercial Bank
Palestine Monetary Authority	Center for Development & Labor Studies	Jordan-Kuwait Bank
National Center for Studies & Documentation	Bisan Center for Research & Development	Jordan Ahli Bank
Municipals Development & Lending Fund	Land Research Center – LRC	The Housing Bank for Trade & Finance
Martyrs' Families & Injured Care Establishment	Arab Studies Society	Egyptian Arab Land Bank
	Arab Scientific Institute for Research & Transfer of Technology (ASIR)	Cairo-Amman Bank
	Alpha International for Re-search, Polling & Informatics	Bank of Palestine PLC.
		Bank of Jordan
		Arab Islamic Bank
		Arab Bank PLC

Source: PASSIA (2020)

Annex 9 Accommodation facilities in Palestine

AHA's Hotels	Web site	Location
Ambassador Hotel (5*)	www.ambassador.com	Al Quds
American Colony (5*)	www.americancolony.com	Al Quds
Holy Land Hotel (4*)	www.holylandhotel.com	Al Quds
Ritz Hotel (3*)	www.jerusalemritz.com	Al Quds
Millennium Palestine (5*)	https://www.millenniumhotels.com	Ramallah
Palestine Plaza Hotel (5*)	www.palestineplazahotel.com	Ramallah
Caesar Hotel (4*)	www.caesar-hotel.ps	Ramallah
Mirador Hotel (4*)	www.elmirador.ps	Ramallah
Ankars Suites & Hotel (3*)	www.ankars.ps	Ramallah
City INN Palace (3*)	www.cityinnpalace.com	Ramallah
Crown Suites Hotel (3*)	www.crownsuiteshotel.ps	Ramallah
Rocky Hotel (3*)	www.rockyhotel.com	Ramallah
Royal Court Hotel (3*)	www.rcshotel.com	Ramallah
Retno Hotel (2*)	www.retnohotel.com	Ramallah
Rets Hotel (1*)		Ramallah
Oasis Jericho (5*)	www.oasis-jericho.ps	Jericho
Al Qasr Hotel (3*)		Nablus
Al Yasmeen Hotel (3*)	www.alyasmeen.com	Nablus
Hebron Hotel (1*)		Hebron
AHA's Hotels	Web site	Location
Grand Park Hotel (5*)	www.grandpark.com	Bethlehem
Jacir Palace Hotel (5*)	www.jacirpalace.ps	Bethlehem
Saint Gabriel Hotel (5*)	www.st-gabrielhotel.com	Bethlehem
Ararat Hotel (4*)	www.ararat-hotel.com	Bethlehem
Bethlehem Hotel (4*)	www.bethlehemhotel.com	Bethlehem
Grand Park Bethlehem (4*)	www.grandpark.com	Bethlehem
Holy Family Hotel (4*)	www.holyfamilyhotel.com	Bethlehem
Manger Square Hotel (4*)	www.mangersquarehotel.com	Bethlehem
Nativity Hotel (4*)	www.nativityhotel.net	Bethlehem
Paradise Hotel (4*)	www.paradisebethlehem.com	Bethlehem
Shepherds House Hotel (4*)	www.shepherds-house.com	Bethlehem
Alexander Hotel (3*)	www.alexanderhotel.com	Bethlehem
Angel Hotel (3*)	www.angelhotel.ps	Bethlehem
Holy Land Hotel (3*)	www.holylandhotel.com	Bethlehem
Murad Resort (3*)	www.murad.ps	Bethlehem
Nativity Bells Hotel (3*)	www.nativitybellshotel.ps	Bethlehem
Sahara Bethlehem (3*)	www.saharabethlehem.com	Bethlehem
St. Nicolas Hotel (3*)	www.nicolashotel.com	Bethlehem
Salam Hotel (1*)	www.salambethlehem.com	Bethlehem

Annex 9 Accommodation facilities in Palestine (continued)

Hostels, Hospices & Guesthouses	
Al-Yakhour Hostel	Al-Kayed Palace Guesthouse
Area: D Youth Hostel	Al-Mutran Guesthouse
Auberg-Inn - The House of Eggplant	Al-Rowwad Guest House
Bunksurfing Hostel	Armenian Guest House
Citadel Youth Hostel	Beit Al-Sham Guest House
Fauzi Azar Inn	Beit Efram Guest House
H2 Hostel Hebron	Beit Ibrahim Guesthouse (Abrahams Herberge)
Habibi Hostel	Bethlehem Bible College Guesthouse
Hostel in Ramallah	Bethlehem Lutheran Guesthouse - Abu Jubran
House of Peace Hostel	Christ Church Guest House
New Swedish Hostel	Dar Al-Balad Restaurant & Guesthouse
Petra Hostel	Dar Al-Majus Guest House
Rosary Convent Hostel	Evangelic Lutheran Hospice Guesthouse
Sami Youth Hostel	Khouriya Family Guesthouse
Success Hostel in Nablus	Knights Palace Guesthouse
The School Hostel	Lutheran World Federation "Victoria" Guesthouse
Austrian Hospice	Mosaic Guesthouse
Casa Nova - Franciscan Pilgrims House	Salam Guesthouse
Charles de Foucauld Pilgrim's Hostel	Sebastia Guesthouse
Comboni Missionary Sisters	Simsim Guesthouse
Deir Hijleh Monastery	St Andrew's Scottish Guest House ("The Scottie")
Ecce-Homo Convent	St. Andrews Guest House
Foyer des Pelerins Greek Catholic Patriarchate	St. George's Pilgrims' Guest House
Franciscaines de Marie 'White Sisters'	St. Vincent Guesthouse
Indian Hospice	Star Mountain Guesthouse
Maison d'Abraham	Tabgha Guesthouse
Mater Misericordiae Jerusalem	Talitha Kumi Guest House
Salesian Sisters Pilgrims' Home	Zaytouna Guesthouse (Deir Al-Hijleh Monastery)
Sisters of Nigriza	Alexandra House
St. Charles Hospice	Auja Eco Center
St. John Church	Mark House
St. Thomas Home	Michel House
The Bridgettine Sisters	Paulushaus

Annex 10 F&B Facilities in East Jerusalem

Nutella Chocolate Pizza	Zad Rest & Cafe
Nordic Café	Victoria Restaurant
Matbakh Zuwada	Al Shuleh Grill Co.
Garage Burger	Rossini's (French & Italian)
Demashqi Sweets	Pizza House
Zad Waffles	Philadelphia (Arabic, International)
Potato Shop	Patisserie Suisse
Kasho	Patisserie Sheikh Jarrah
Hanadi's Fun Cake	Patio Restaurant
Sarwa Street Kitchen	Patio Restaurant (Oriental & International)
Petra Garden's Restaurant	Pasha's Restaurant (Oriental & International)
One More	Panoramic Golden City (Oriental)
Nutella Shop- Beit Hanina	Nafoura Restaurant
Nutella Chocolate Pizza	Al-Ni'am Restaurant
Val's Brasserie Restaurant (Oriental & International)	Al-Mihbash Restaurant (Arabic & International)
Istanbul Samer	Mac Sandwich
Versavee Restaurant	Grill & Pizzotto (French & Italian)
Nakhet Al Quds	Al-Khatib Catering
La Rotisserie	Kan Zaman (Arabic, International)
Notre Dame	Garden's Restaurant
Legacy	Cardo Restaurant
Just Burger	Borderline (Italian)
Bulghourji	Educational Bookshop
The Bookshop at The American Colony Hotel	Askadinya (Italian, French)
The American Colony	Armenian Tavern (Armenian)
Ambassador	Arabesque (Oriental & International)
Gallery Café	Al-Diwan (Italian-Arabic)
Az-Zahra (Arabic)	Amigo Emil

Source: PASSIA (2020)

Annex 11 List of arts & crafts facilities/shops

Abeer Nassar (Silver Corner)	Knaaneyya Company for Handcraft	Reno's Craft Box
ALJW Handmade	KR Handmade Crafts - Lydda	Resham Handmade Gifts
Al-Sanabel	Lamassaty Accessories	Royal Gemini
Amal for Jerusalemite Heritage	Lavie	Salsal
Amany for Embroidery	Liras Handmade Accessories	Sana' Art & Craft
Anan Art	Lubna's Touch	Sandrouni Ceramics
Antreassian Ceramics	Ma'an Lil- Haya	Satan
Aseel	Mostadam Eco Design	Shaffaf
Bonds without Borders	Motarazat Sabaya	Shop Made in Palestine
C & L Design	Mutarazat	Silsila Jewelry Design
Ccrafts	Nada - Hand Made	Smart Art
Craftastic	Nadia Abu Ghattas	Stones & More Accessories
EA Crafts & Accessories	Nadine Khalili Handmade Jewelry	Talleh
Fairouz Nastas	Nadya Hazbunova Fashion & Olive Wood Jewelry	The Palestinian Pottery – Armenian Ceramics
Garo Sandrouni	Nahawand	The Palestinian Pottery
Habkara Shop	Naheel Handmade Jewelry	The Workshop - Basel Amad
Hand Made Palestine	Nakesh o Hajar	Tubbeh
Handy Accessories	Nawahand	Turabi Ceramics
Holy Land Soap	Nisf Jubeil Ceramic	Ubeidiya Designs
Istabrak	Noor Handmade Jewellery	Washem – Tattoo Designs
J & J Design	Noora Heritage House	Wasl – Arabic Calligraphy
Jerusalem Pottery Hagop Karakshian	Palestinian Straw & Traditional Textiles	We Make
Jood Gallery	PalGlass	Yasmine
Jwelery & Crafts	Pure B	Zaytouna Jewelry
Kharaz	Rana Kamal Batrawi	

Source: PASSIA (2020)

Annex 12 List of festivals and museums

FESTIVALS	MUSEUMS
Al-Kasaba International Film Festival (KIFF)	Wujoud - Museum and Cultural Center
Artas Lettuce Festival	Scientific Museums
Bird Migration Festival	Science & Technology House
Birzeit Heritage Week	Russian Museum Park Complex
Canaan/PFTA Olive Harvest Festival	Rockefeller Museum
Christmas Bazar	Ramallah Museum
Christmas Celebrations Programs	The Palestinian Museum
Contemporary Dance Festival	Palestinian Heritage Center (PHC)
Fête de la Musique	Natural History Museum
International Puppet Festival	Museum of Palestinian Popular Heritage
Jerusalem Ka3ek Festival	Murad Castle Museum
Jerusalem Music Festival	Al-Mathaf Museum
Olive oil Festival	Mahmoud Darwish Museum
Palestine International Festival	International Nativity Museum
PalFest - Palestine Festival of Literature	Dar Zahran Heritage Building
Shashat Women's Film Festival	Dar Al-Tifel Al-Arabi Museum for Palestinian Heritage
Taybeh Oktoberfest - annual village festival	Bethlehem Folklore Museum (Beituna At-Talhami Museum)
The Jerusalem Show	
Theatre of the Oppressed	Al-Bad Museum (Badd Giacaman Museum)
Vinfest in Taybeh	Artas Old Village Museum
Youth Drama and Animation Festival	Abu-Jihad Museum for the Prisoners Movement Affairs

Source: PASSIA (2020)