

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

**COMCEC Coordination Office**  
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# Outline

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

# Purpose

Identify characteristics of Al-Quds as a destination

Make an inventory of supply

Define actual and potential demand

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

Make an assessment of needs for Al-Quds tourism

Suggest a road map covering strategies and an action plan

# Methodology



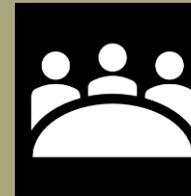
LITERATURE REVIEW



OBSERVATIONS AND MYSTERY SHOPPING:  
REPLACED WITH IN-DEPTH INTERVIEWS  
AND SOCIAL MEDIA ANALYSIS.



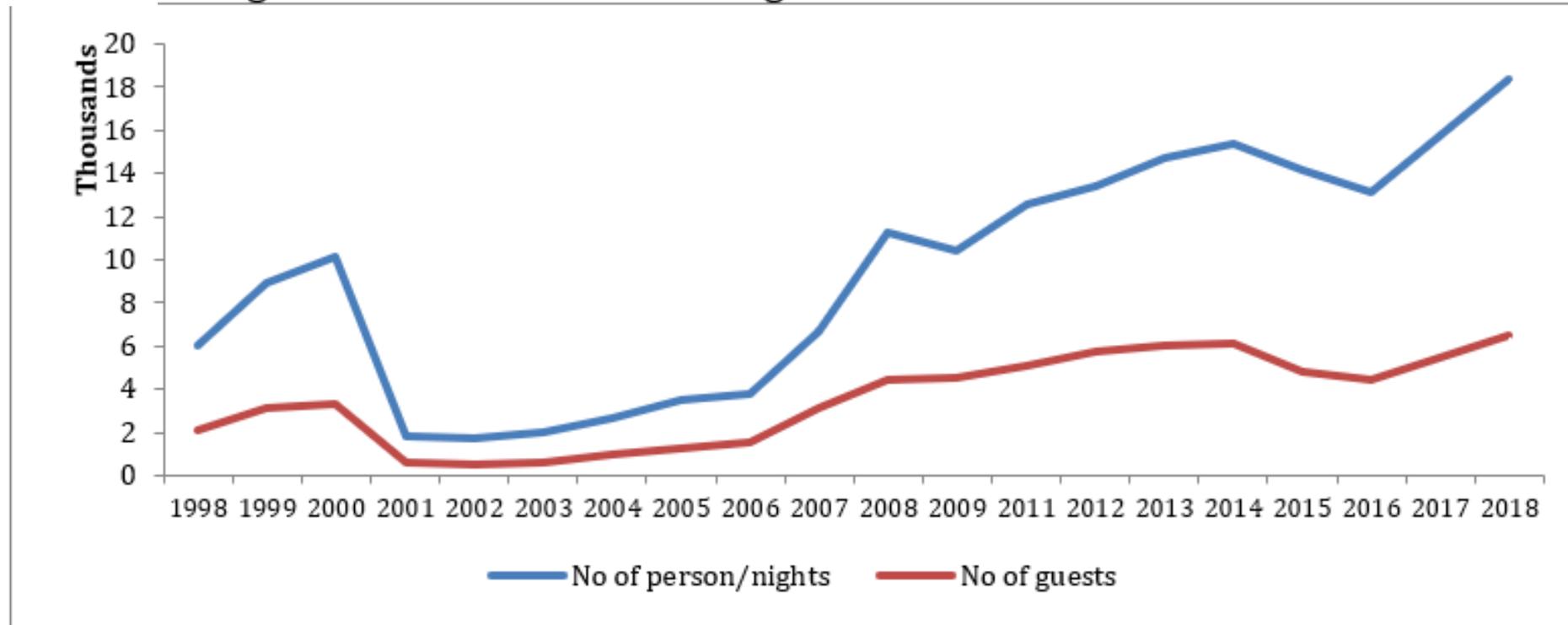
INTERVIEWS AND SURVEYS



STAKEHOLDER WORKSHOPS

# Findings: Tourism Trends

**Change in Number of Guests and Nights**



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

\* Data before 2012 include both West Bank and Gaza, while the 2012 and later relate only to West Bank.

\*\* Data for 2010 could have not been found.

# Findings: Tourism Trends

**Change in Average Length of Stay**



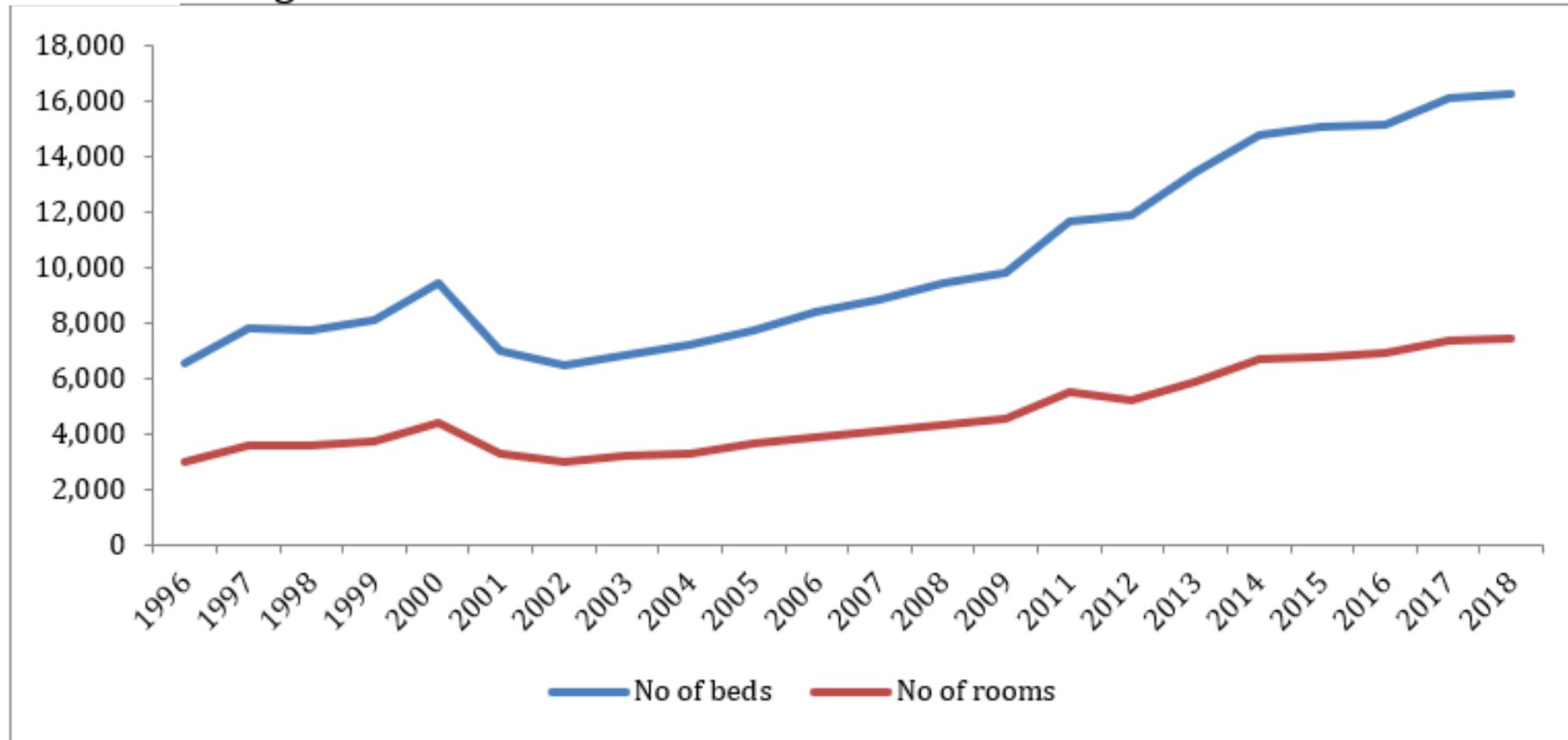
*Source: By authors own, based on the data by PCBS*

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# Findings: Tourism Trends

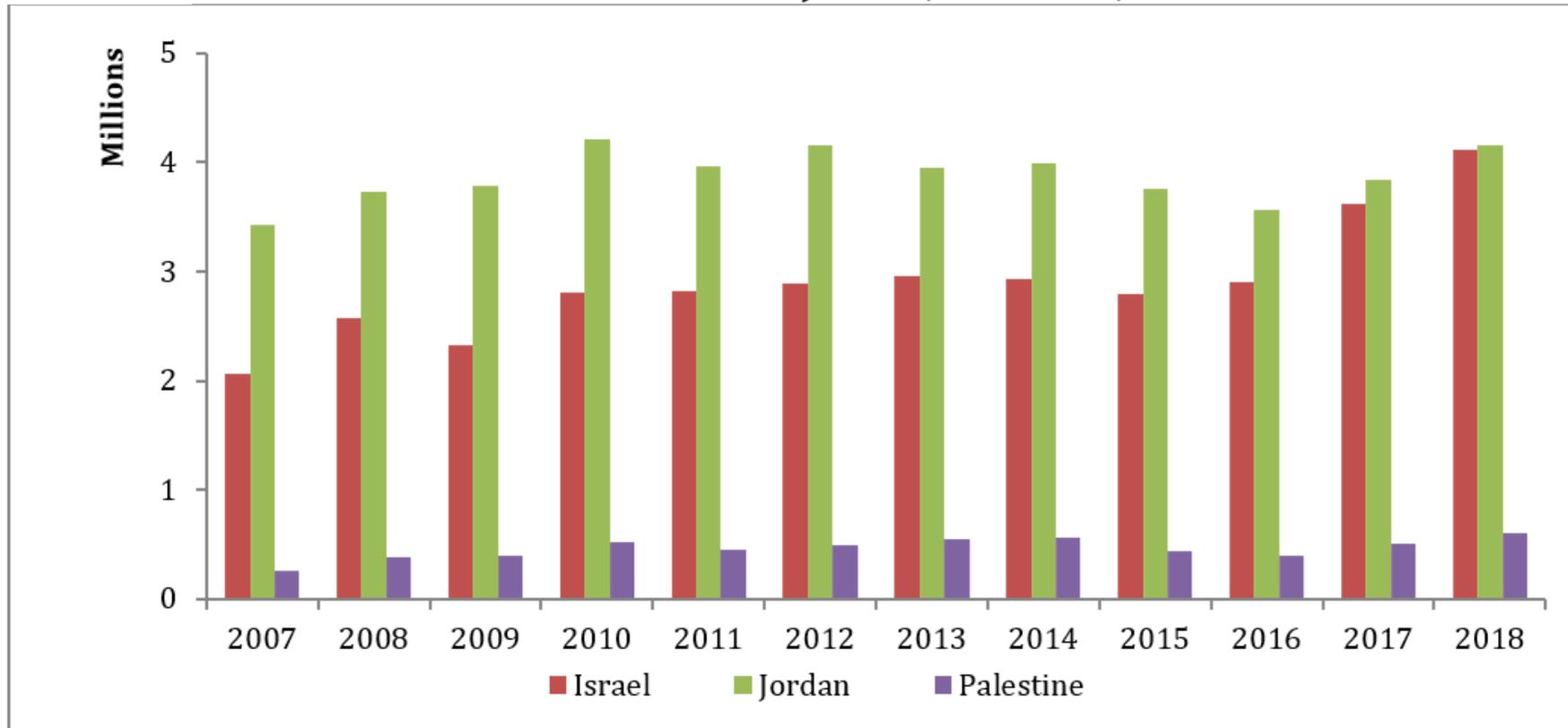
**Change in Number of Room and Beds**



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

# Findings: Tourism Trends

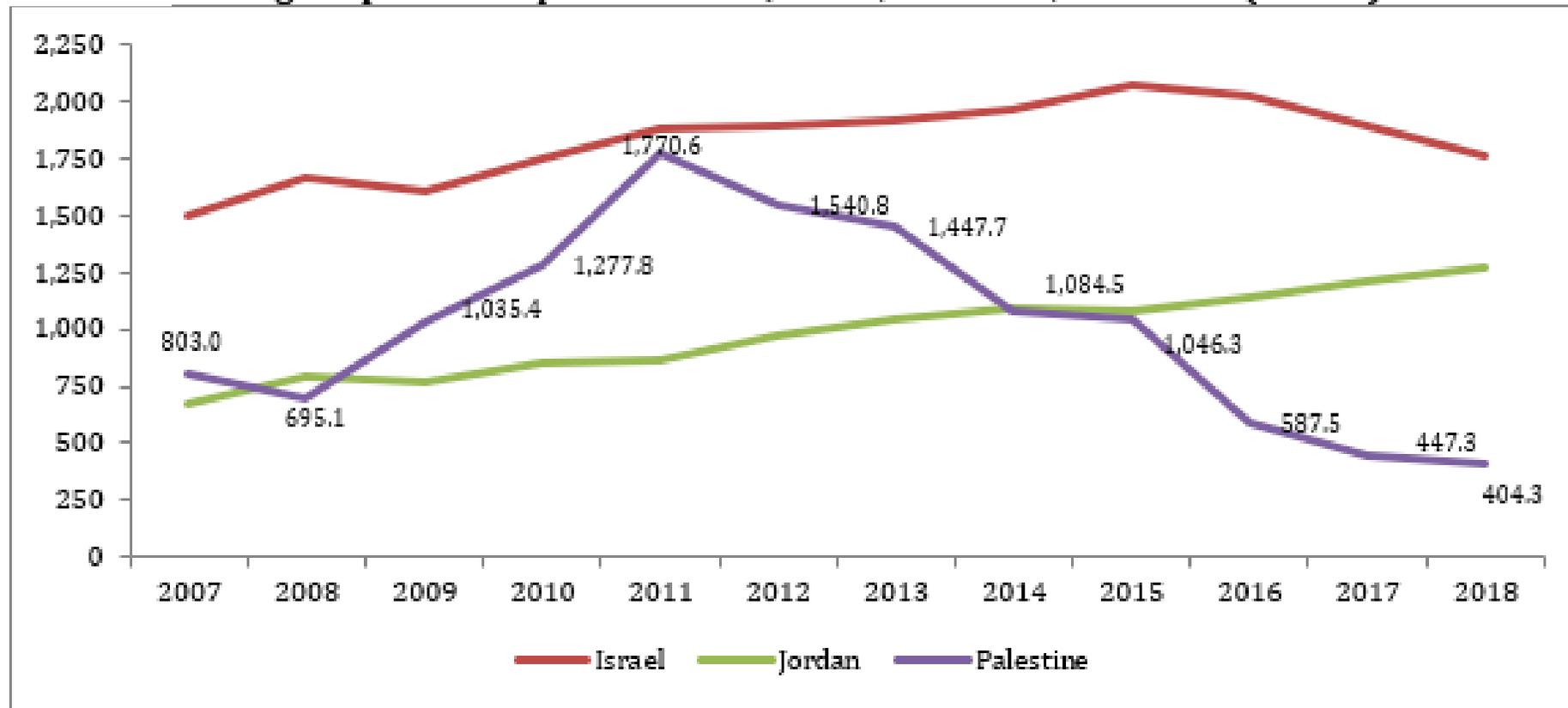
**International Tourist Arrivals in Jordan, Palestine, and Israel**



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

# Findings: Tourism Trends

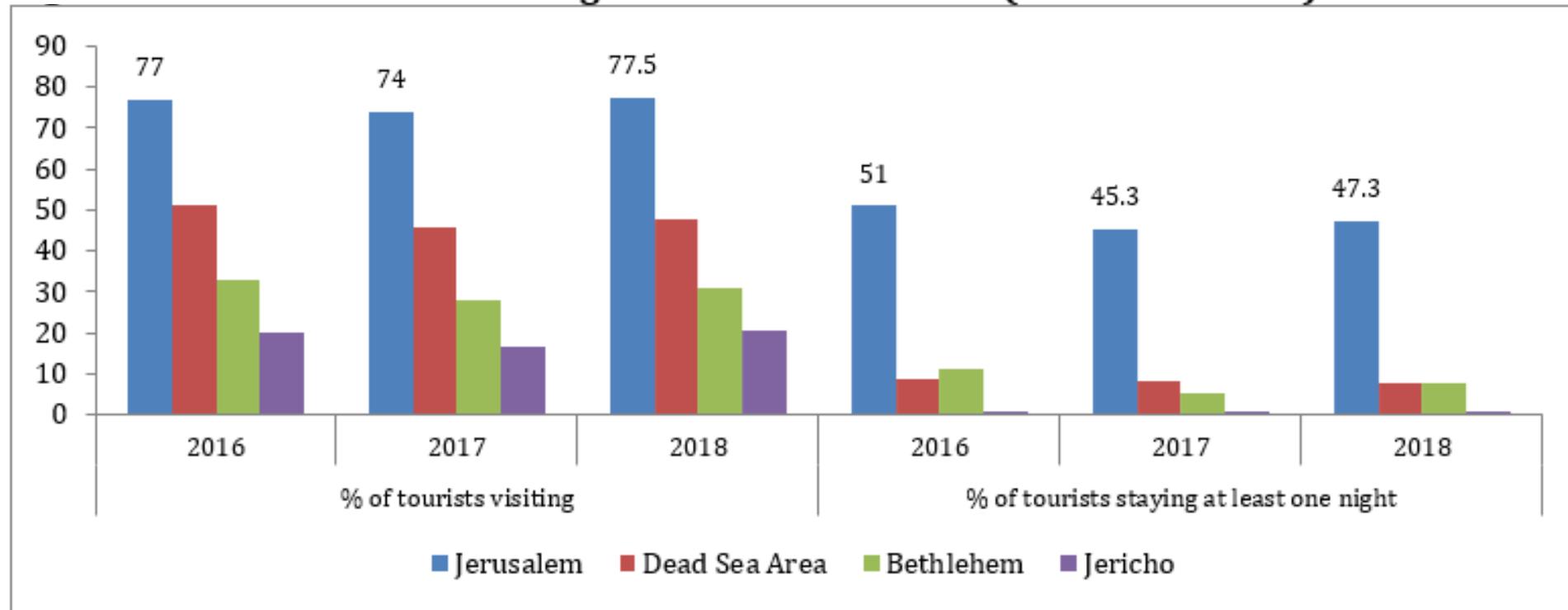
**Average Expenditure per tourist in Jordan, Palestine, and Israel (in USD)**



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

# Findings: Tourism Trends

**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)

# Findings: Tourism Trends

<b>Purpose of Visit</b>		
	Frequency	%
Religion and pilgrimage	13	39.4
Recreation and holidays	14	42.4
Business	5	15.2
Visiting relatives or friends	1	3.0

# Tourist satisfaction: Most and Least

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

## Tourist satisfaction: Worth noting

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

# Comments of International Tour Operators

- In general tourists are highly satisfied about their experience in Al-Quds.
- Infrastructure: Facilities needing refurbishment, congestion in popular sites, streets are not clean and they are dark at night.
- Service quality: Few staff speak foreign languages, training needs of staff and tour guides, improving managerial skills, limited selection of souvenirs.
- Promotion of marketing. False image of insecurity.

# Comments of Local Stakeholders

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

# Common Issues

Remarks from  
Palestinian  
Professionals

Remarks from  
International  
Professionals

- Political situation
- Israeli restrictions
- Israeli tour guides restrict contact with Palestinians
- Insufficient capacity of accommodation facilities
- Financial deficiencies
- Lack of business culture to act together
- Deficiencies in technologic literacy
- Lack of knowledge in legal matters
- Lack of legal consultancy
- Low awareness of locals

- Negative image
- Israeli occupation
- Deficiencies in quality of urban infrastructure
- Deficiencies in labelling and signing of urban facilities and historic sites
- Insufficient variety of services

- Managerial deficiencies
- Deficiencies in marketing
- Shortage of alternative packages and programs
- Palestinian guides are friendlier but not as qualified as Israeli ones

- + High satisfaction
- + Friendly people
- + Richness in historic attractions
- + Richness in cuisine
- Dirtiness in public areas and facilities
- Lack of activities
- Lack of night life
- Deficiencies in service quality
- Deficiencies in qualifications of staff

- + Location of facilities
- + Friendly staff
- Insufficiencies of web-sites
- Deficiencies in shopping opportunities

- + No ethical discrimination
- + Willingness to work with Palestinians if quality standards are met
- + Oriental atmosphere
- + Shopping in local bazars
- Crowdedness in tourist sites
- Sometimes Palestinian guides' complaints about occupation may be annoying for tourists
- Lack of quality restaurants
- Weakness in foreign language skills
- Misbehaviour of shopkeepers (e.g. cheating)
- Misbehaviour of coach drivers (such as asking tourists for tips)

- + Safe city
- Israeli checkpoints
- Deficiencies in physical quality of facilities
- High prices

Remarks from  
Tourists

# SWOT : TOWS

- A DMO should be established immediately with financial (and technical, if necessary) support of international institutions.
  - International financial support should also be provided during the first 5-years for the DMO until it becomes financially sustainable.
- Urgent financial support and grant programs should be designed and implemented to eliminate the economic damages of COVID-19 pandemic and to prepare businesses to post-COVID-19 period.
  - Programs aiming trainings and physical renovations should be carried out to increase the quality and product/service variety.
- Cooperation and training programs should be developed with international educational institutions to increase technical/managerial skills of managers and employees.
  - It should be ensured that middle or top-level managers gain experience in international businesses.
  - Programs and trainings should be organized in order to increase digital literacy and innovation skills in tourism enterprises.
- The survival and development of tangible and intangible "Palestinian identity and culture" should be lobbied within UNESCO and other important cultural institutions.
  - Local products/souvenirs would gain more importance in post-COVID-19 period, therefore, strategies should be developed to underline the authenticity and locality of cuisine, souvenirs, architecture, life styles, etc.

# Value Chain Analysis

## General tourism value chain analysis scheme

### Value Chain of Tourist's Experience

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 patisseries	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	Bars Night Clubs	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					
<b>Construction, Energy, Water, Waste, Education, Communications, Public security and health</b>									
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									

# Value Chain Analysis: Pre-trip Actors

**Tourism / Travel Agents and Tour Operators:** HLITOA (50 Tour Operators), PSTTA (60 Professional Members), JTC: Enjoy Jerusalem

**Media:** 215 organisations – TWiP

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

**Advertisement and Promotion Agencies:**

[visitpalestine.ps](http://visitpalestine.ps) ; [www.travelpalestine.ps](http://www.travelpalestine.ps) ; [atg.ps](http://atg.ps)

**Public Administration:** Many in Palestine – virtually none in Al-Quds

# Value Chain Analysis: On-trip Actors

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

**Food & Beverage Facilities:** More than 50 registered restaurants

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

**Arts Crafts and Souvenirs:** 75 shops listed in PASSIA

**Museums, Festivals & Cultural Events:** Some need of improvement for festivals and events

# Value Chain Analysis: Post-trip Actors

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

# Value Chain Analysis

All actors in the value chain are present and active

Experience in collaboration

Need for establishing an inclusive platform (restructuring existing ones) for destination management to fill the gap in the post – trip section of the value chain (quality assurance – certification)

# Benchmarking: Drawing Lessons from others

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

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

# Benchmarking: Drawing Lessons from others

## **Lessons Learned:**

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

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

## Needs Assessment:

- Infrastructural Needs
- Service quality
- Finance
- Promotion and marketing

# Needs Assessment: Infrastructural Needs

Governing body working towards improvement of tourism in Al-Quds.

Physical infrastructure:

Facilities: renovation and refurbishment, increasing capacity, introducing local cuisine

Urban Infrastructure: street lighting, repair, cleanliness

Entertainment facilities, festivals and events

## Needs Assessment: Service Quality

Human resources development (for staff and managers)

Variety of services (local food and traditions).

Better informed tour guides

More variety / better presentation of arts and crafts.

Improved Web Sites

## Needs Assessment: Finance

Investments for renovation, refurbishment, improvement of services.

Surviving COVID-19 pandemic.

Need for attracting international investments

# Needs Assessment: Promotion and Marketing

Holistic approach to marketing Al-Quds as destination.

Establishing good working relations with international organisations and international media.

Organisation of info-tours.

More user friendly and up-to-date promotion web sites and mobile applications

# Road map: An (in)formal structure

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

### Participative:

- Private sector representatives (all sub-sectors)
- Religious institutions
- Universities
- Chambers
- Support sectors (ICT, business support organisations)
- NGOs representing local citizens

# Road map: An (in)formal structure

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

### Well Organised:

- General Assembly
- Executive Board
- Secretariat (CEO, promotion, statistics, business development)
- Advisory Boards
- Working Groups

# Road map: An (in)formal structure

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

### Mandate:

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

# Road map: Diversification of Services

Going beyond pilgrimage:

- Thematic tours (nature, local culture, local cuisine)
- Creating cultural and historic narratives
- Daily tours for expats
- Enriching souvenirs (sustainable souvenirs)
- Street arts, festivals, art performances

# Road map: Improving quality: Human Resources

- Education and training for tourism staff
- Awareness raising among citizens
- Public training programmes (language, skills)
- Collaboration with universities and other education institutions.

# Road map: Improving quality: Renovation

Renovation / refurbishment of facilities

- Hotels
- F&B Facilities

Re-opening businesses

# Road map: Improving quality: Urban Services

- Recreation areas
- Environment friendly /trendy transportation
- Art performance areas
- Street guiding and signages
- Street lighting

# Road map: Improving quality: Promotion

## Promotion and marketing

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

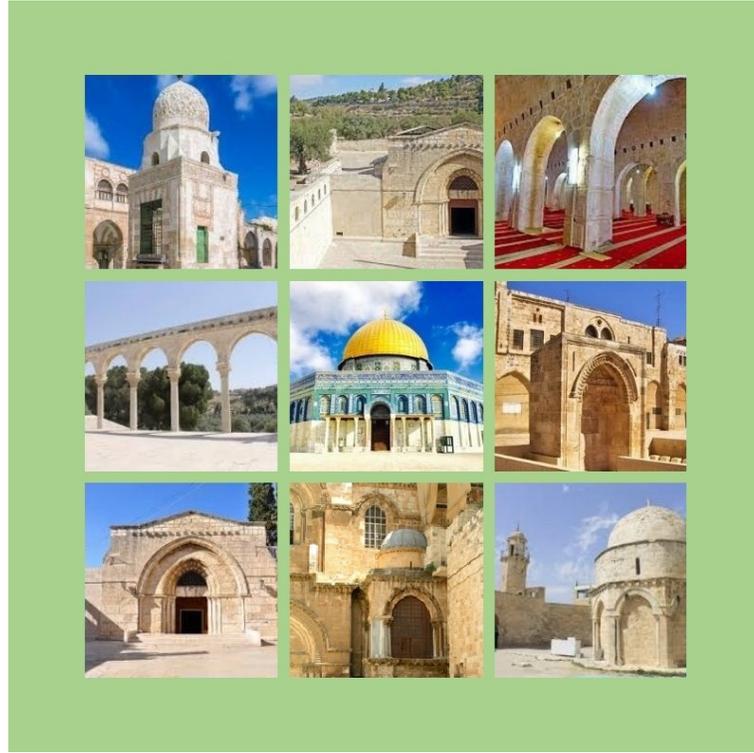
# Vision & Mission

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

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



# COMCEC Al-Quds Program



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TEŞEKKÜRLER  
THANK YOU