



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

COMCEC Coordination Office
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HOŞGELDİNİZ

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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

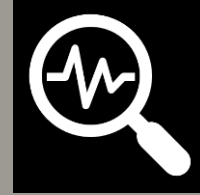
Make an assessment of needs for Al-Quds tourism

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.



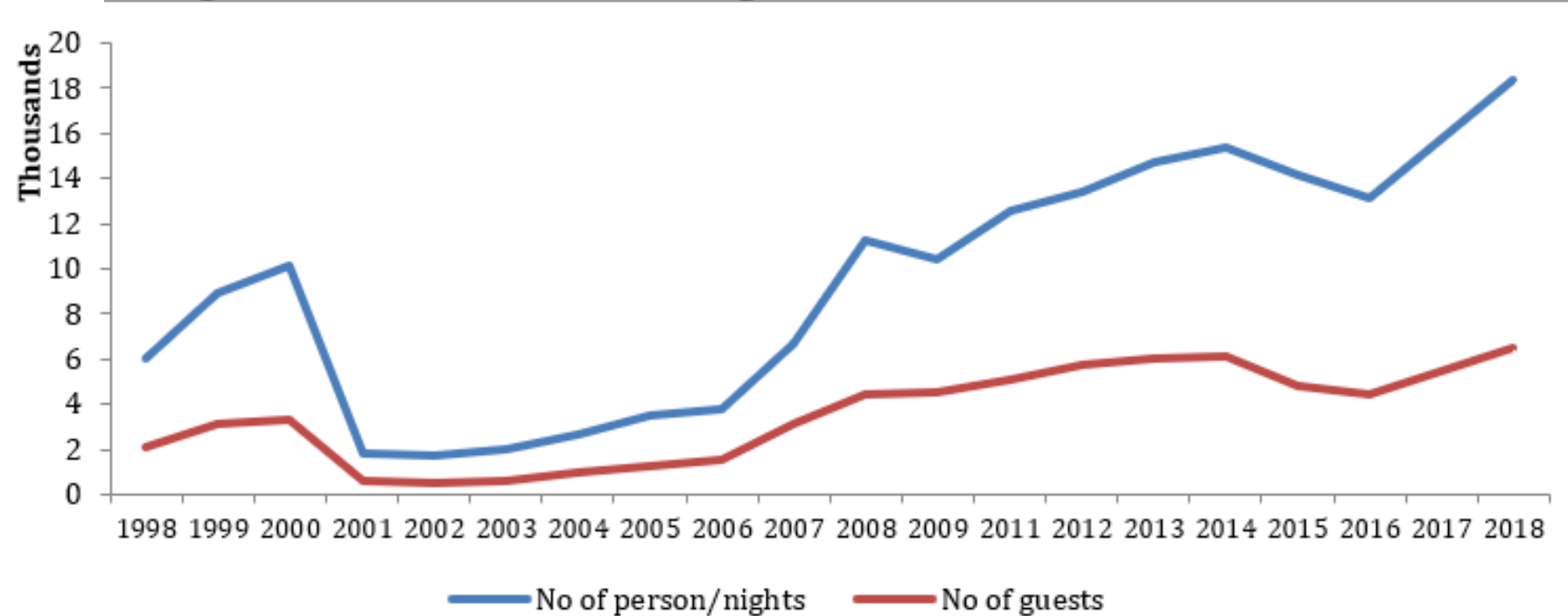
INTERVIEWS AND SURVEYS



STAKEHOLDER WORKSHOPS

Findings: Tourism Trends

Change in Number of Guests and Nights

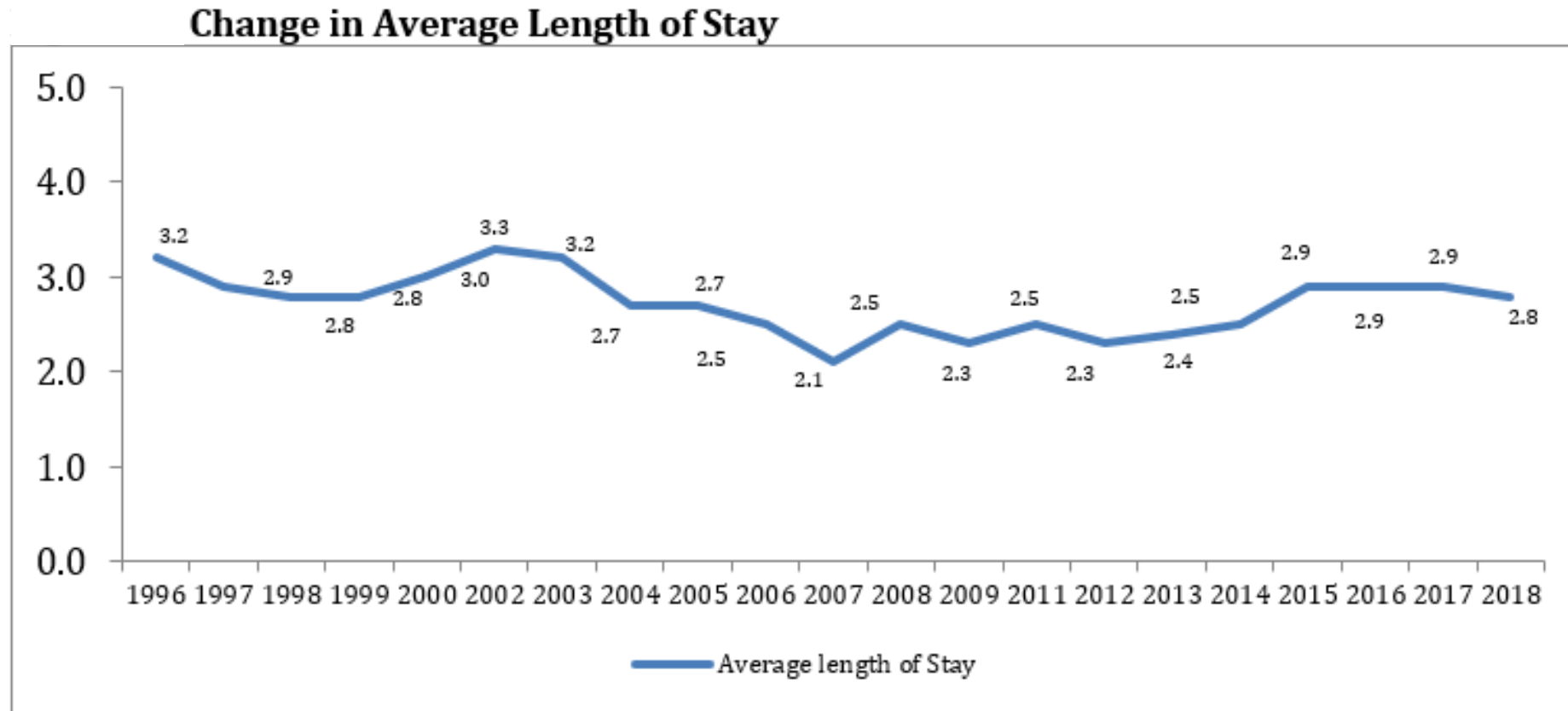


Source: By authors own, based on the data by PCBS

* 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



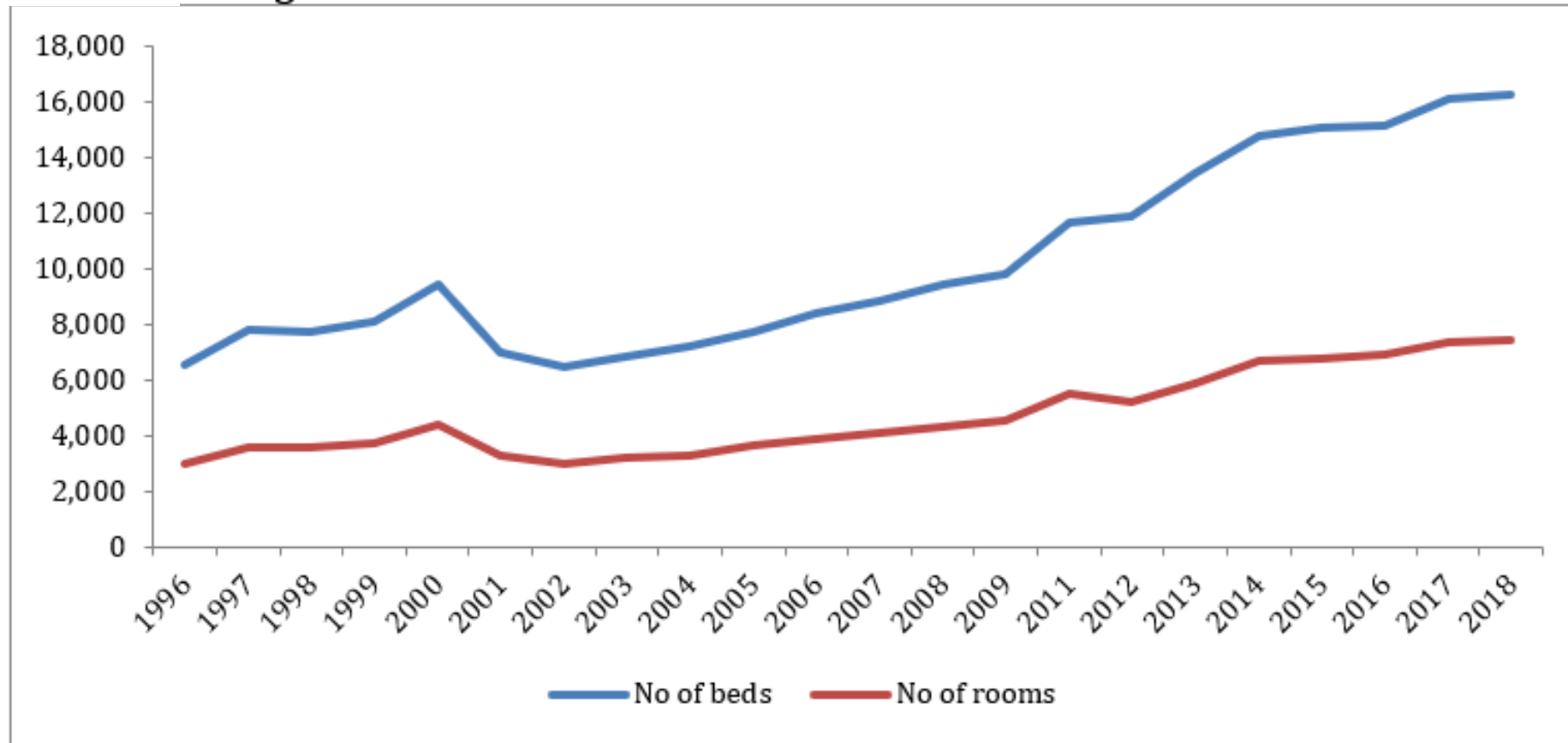
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Findings: Tourism Trends

Change in Number of Room and Beds



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

Findings: Tourism Trends

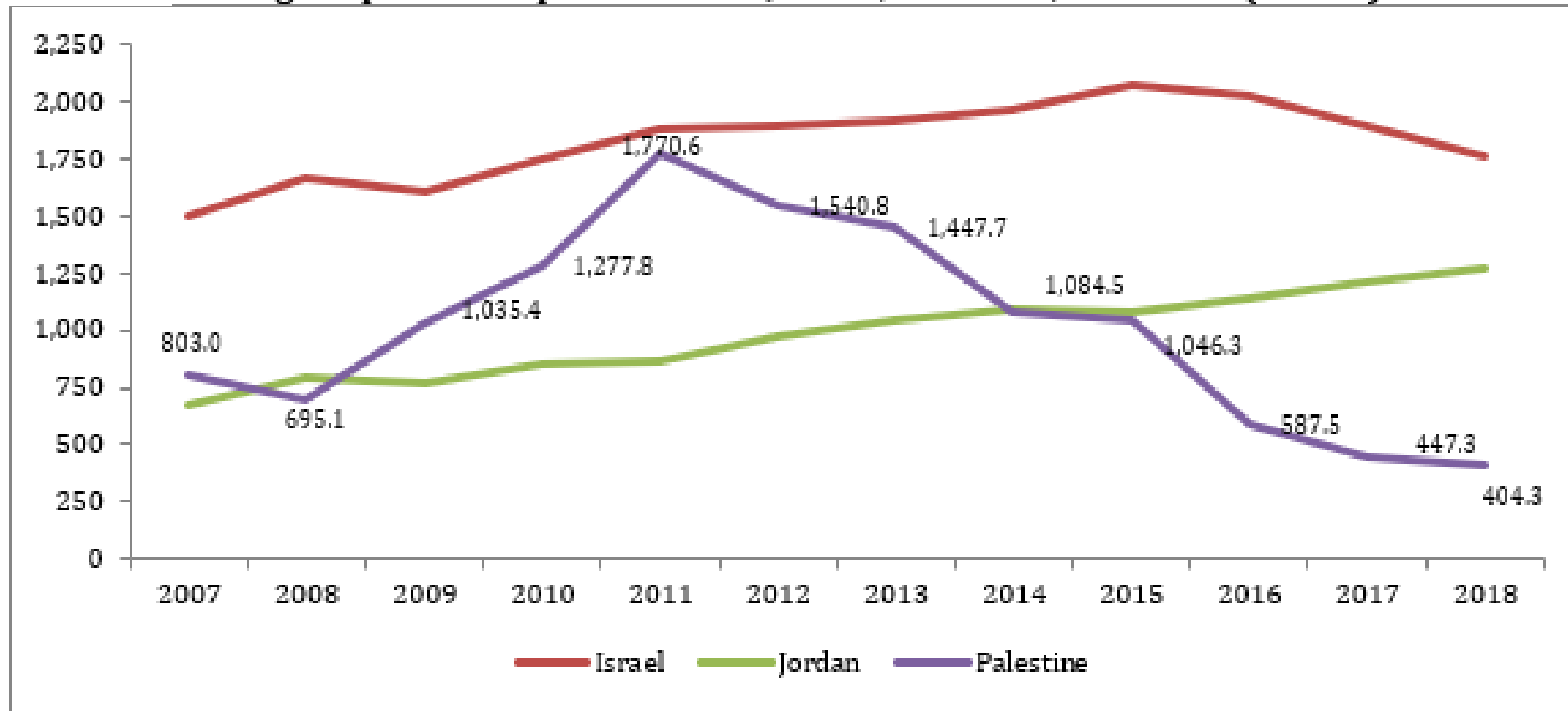
International Tourist Arrivals in Jordan, Palestine, and Israel



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

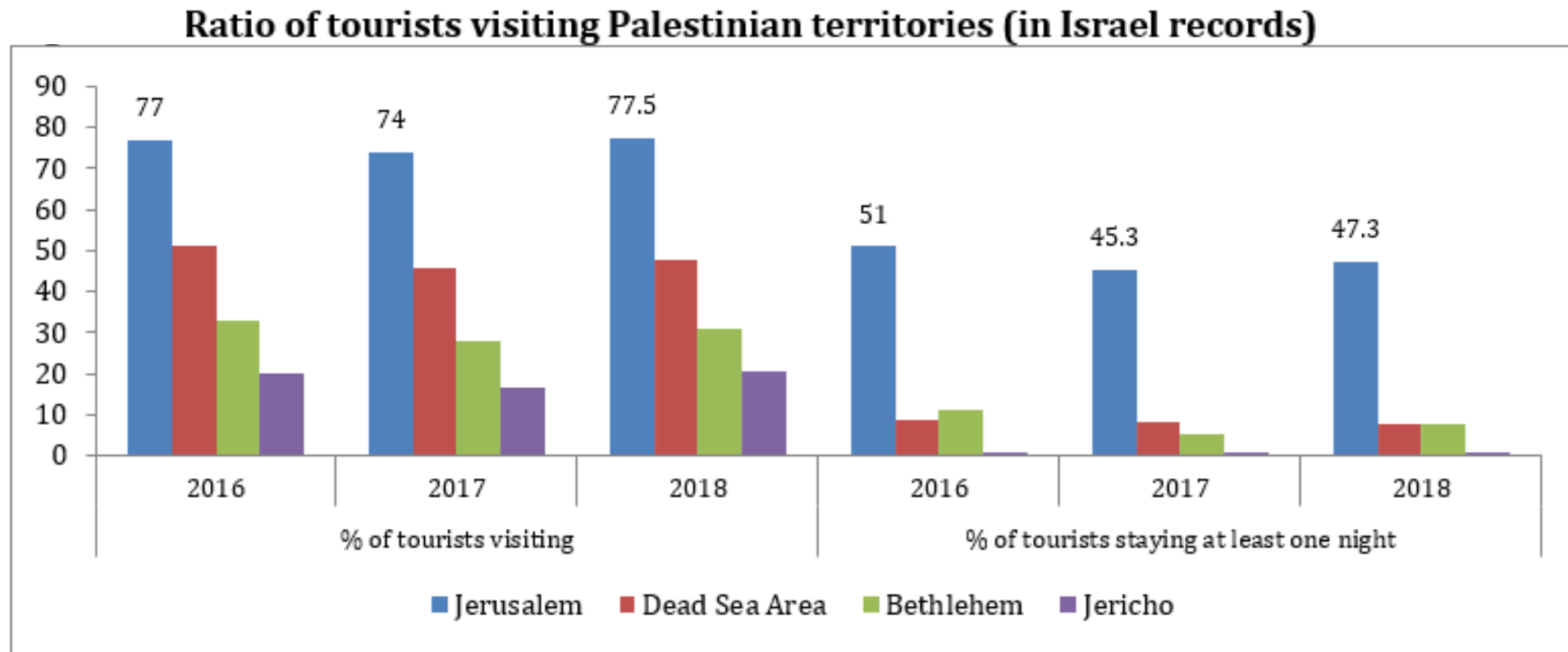
Findings: Tourism Trends

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



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

Findings: Tourism Trends

Purpose of Visit		
	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.

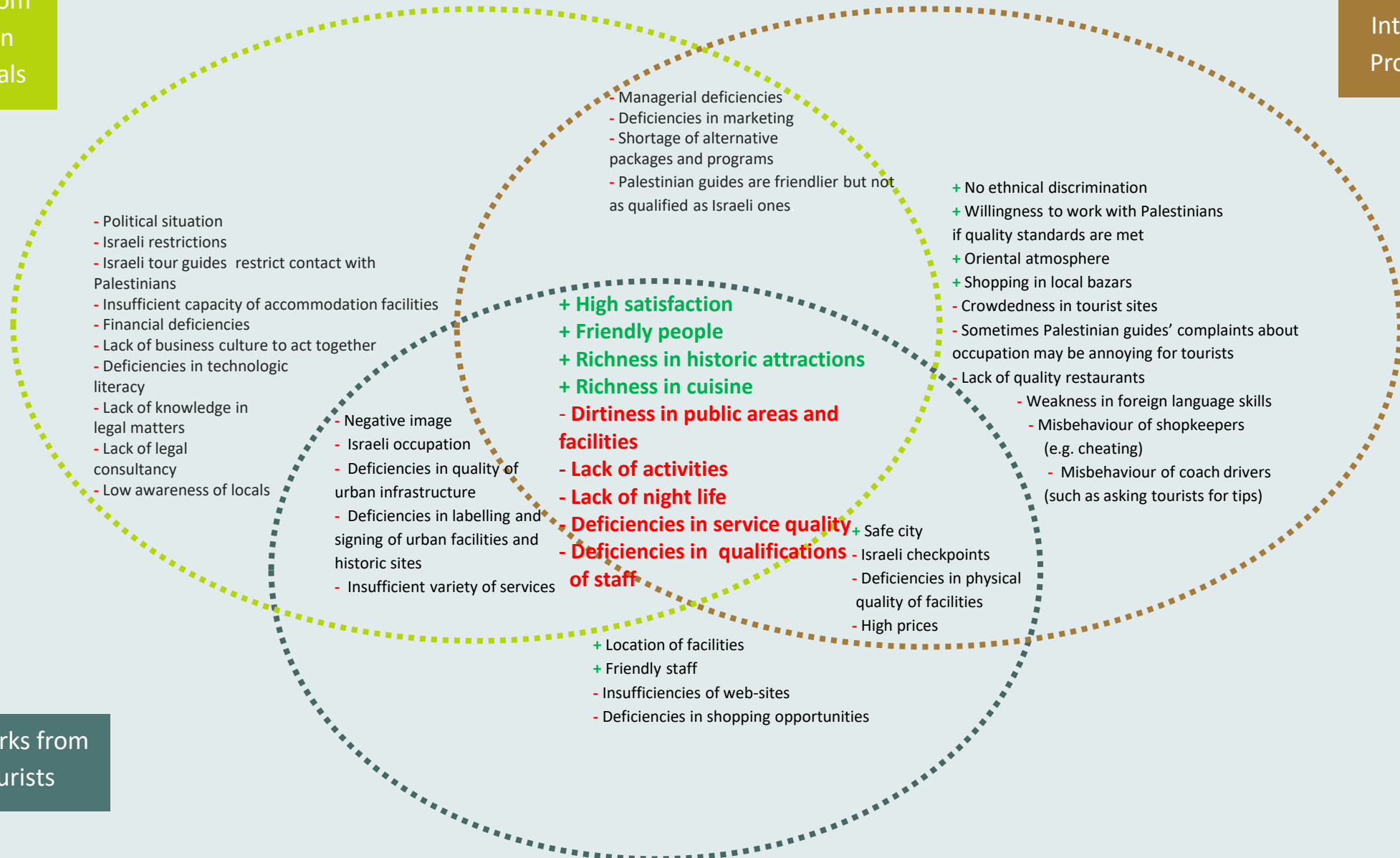
Comments of Local Stakeholders

- 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



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					
	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								

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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 ; www.travelpalestine.ps ; atg.ps

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

Value Chain Analysis: On-trip Actors

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

Food & Beverage Facilities: More than 50 registered restaurants

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

Arts Crafts and Souvenirs: 75 shops listed in PASSIA

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

Value Chain Analysis: Post-trip Actors

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

Value Chain Analysis

All actors in the value chain are present and active

Experience in collaboration

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

Benchmarking: Drawing Lessons from others

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

- 1. Shri Badarinath Dhaam (Pilgrimage Destination on the Route of Char Dhaam Yatra) India,*
- 2. Sri Pada (Adam's Peak) in Sri Lanka*
- 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 Sties

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

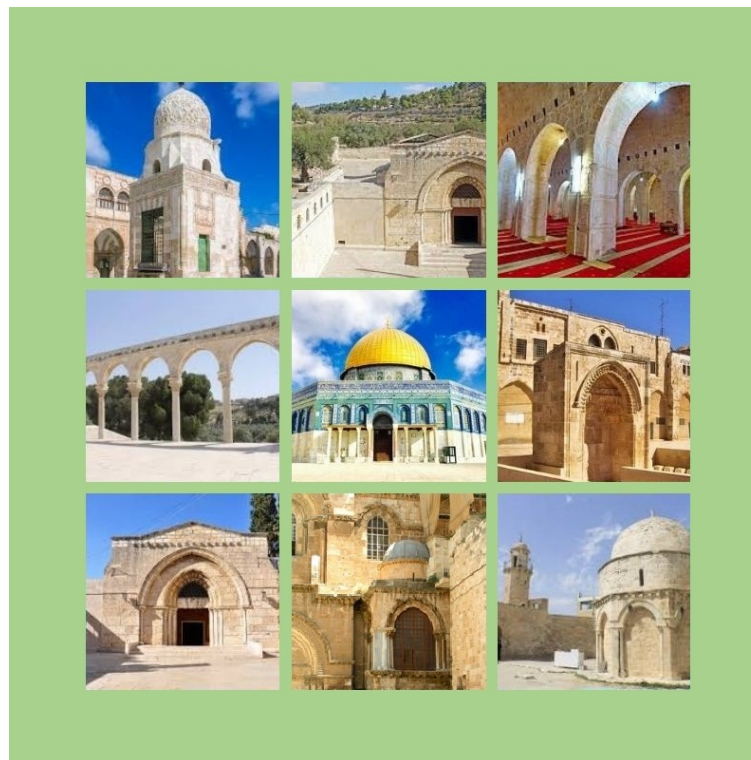
Promotion and marketing

- 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.



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TEŞEKKÜRLER
THANK YOU