

## Destination Palestine 2011 Overview

For another consecutive year, the tourism industry has continued to show full signs of recovery and growth. 2011 witnessed a 5% increase in visitor arrivals to Palestine and a 12% increase in overnight stays with over 1.5 million overnight recorded across Palestine.

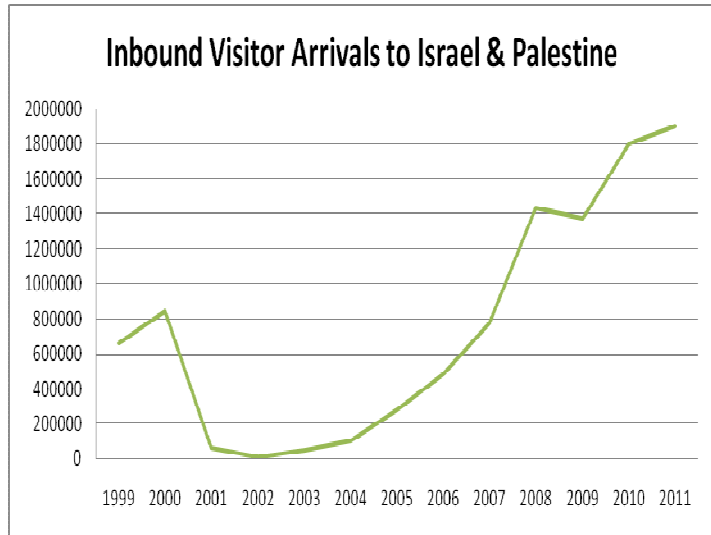
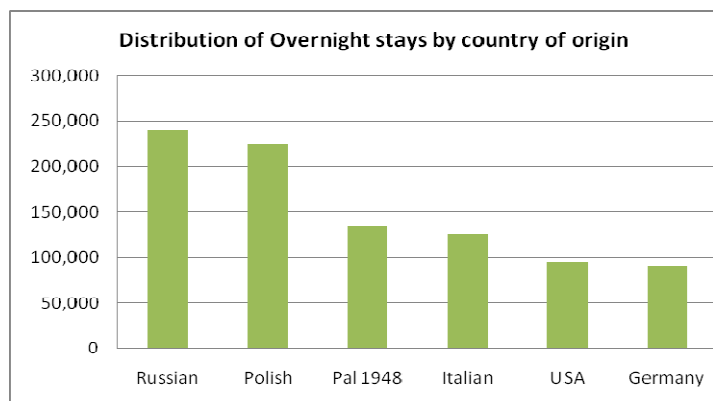
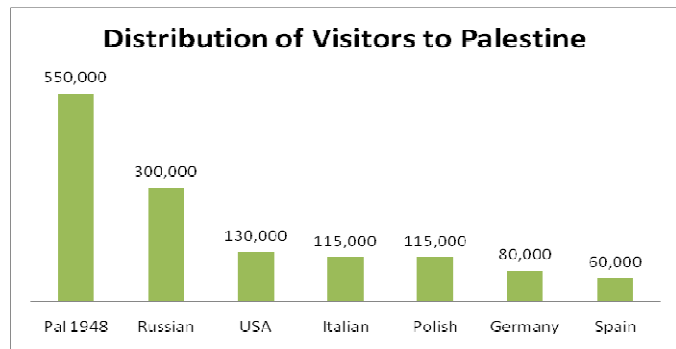


Figure 1 illustrates this steady recovery of visitor flow to Palestine. This recovery began around 2005 and steadily continued reaching a record numbers of foreign visitors and overnight stays. This growth and raise in visitors demand is being met with a constant increase and upgrade of the tourism infrastructure. New hotels, restaurants, and cultural centers, museums and resorts are opening up across the West Bank and East Jerusalem.

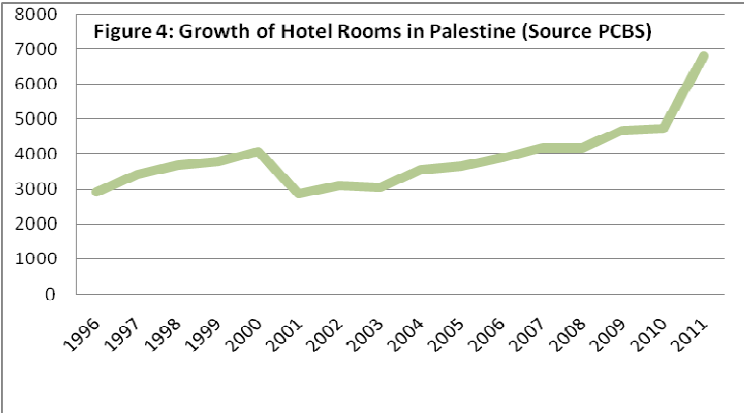
Russia, the US and Italy were among the top 5 market for visitors to Palestine. Also, Russia, Poland and Italy were the top three source destination for overnight stays to Palestine.



In addition to the other traditional markets such as Germany, Spain, France and UK, Palestine continues to see an increase in visitors from new markets such as Indonesia, India and Brazil.

Both the public and private sector are investing millions in developing, restoring and upgrading the industry. The overall tourism offer in Palestine has diversified and expanded its offering. Hotel were upgraded, new hotels opened and continue to open. Recreational parks and resorts, restaurants, cultural centers, new transportation fleets are all among the key investment over the past 5 years.

The growth in the accommodation sector is a clear indicator of this recovery and investment/re-investment into the sector. Today, there are just over 6,800 rooms spread across the country (an increase of 972 rooms from 2010). Furthermore, an additional 1,600 rooms are also under construction in various cities across the West Bank and East Jerusalem. The overall goal of the industry is to double the number of rooms to around 10,000 in the next 7-10 years.



### National Tourism Strategy

The National Tourism Strategy is to have Palestine successfully compete and get its share of regional tourism arrivals, through developing and diversifying the tourism offerings and promoting the richness in cultural, historical and natural resources. While religious tourism will remain the backbone of any tourism offer, the Ministry of Tourism and Antiquities together with stakeholders are enhancing the tourism offer through creating experiential programmes and non-traditional itineraries to be able to attract more visitors and encourage them to spend more time and money in Palestine. More importantly, is to showcase Palestine as an independent destination that is not only an integral part of any visit to the Holy Land, but also to the region as a whole.

This shift in strategic focus will not be easy, as Palestine is faced with numerous challenges and threats that continue to hinder efforts to develop a sustainable tourism industry. The Occupation, with all its facets, is the biggest obstacle. The restrictions on movement and access (on both tourists and Palestinian service providers) make managing tourist flow and developing themed routes very difficult. Israel's refusal to allow Palestinians to renovate, restore and manage key sites located in Areas C, such as Sebastiya, the Jordan Valley, and the coast of the Dead Sea hinder our abilities to develop a comprehensive tourism offer, and the overall lack of control over borders and points of entry makes managing and developing a tourism sector extremely challenging.

Together with other stakeholders, we are also developing alternative tourism through creating experiential programs and non-traditional itineraries. There is a strong focus on developing alternative tourism to Palestine since it is the perfect platform to showcase Palestine's diverse range of religious, historical, cultural and natural sites. Biking, hiking, and birdwatching activities are only a few of the initiatives underway. Cultural celebrations are another key component of enriching the visitor experience. Across Palestine, there are regular cultural festivals that attract both local and international visitors. From the olive harvest and the Taybeh Oktoberfest to the Sebastiya Festival, the Artas Lettuce festival and the Christmas activities in Bethlehem, we are working to promote and integrate these activities and festivals into the overall visitor experience.

## **Strategic Pillars:**

### **Pillar 1: Product / offer Development:**

A key component of Palestine's tourism strategy is to further develop and enhance the overall tourism offer. From developing supporting infrastructure in the main cities to renovating and restoring key sites that can add to the diversification and range of the overall offer, the Ministry of Tourism & Antiquities in close coordination with the private sector is gradually implementing development initiatives in key areas across the West Bank.

Palestine possesses an abundance of sites of antiquity, the majority of which have yet to be excavated, as well as historic buildings of major historic importance. The Department of Antiquities and Cultural Heritage at the Ministry of Tourism and Antiquities has identified around 1994 main archeological sites (Khirbeh, Tell, Old Town), nearly 10,000 archeological features (caves, churches, Maqams, Monasteries etc...) more than 60,000 traditional buildings and a total of 520 excavated sites throughout the West Bank and Gaza.

On the private sector level, the strategy calls for proactive private sector involvement and investment in building and upgrading the services facilities. In the accommodation sector alone, the goal is more than double the current # of rooms to reach 10,000 within the next 5-7 years. In addition to hotels, there is a demand to develop recreational resort and parks (to cater primarily for the local market) in addition to restaurants, cultural centers, museums, transportation and the like.

#### **Pillar II: Policy Reform & Industry Regulations:**

At the Policy making and Regulatory levels, there are various public / private / Civil initiatives underway. One of the main activities is the ongoing work to establish the Palestine Tourism Board in the form of a public/private partnership which will lead the marketing and promotion of destination Palestine. Licensing and hotel classifications are among the other areas where the public & private sector are collaborating.

#### **Pillar III: Private Sector Support & Capacity Building:**

Ensuring a healthy and vibrant private sector is key to the national economic strategy. The private sector resilience has been evident throughout the year as they have carried the industry throughout the period before 1994. Strengthening the private sector institutions (especially those in East Jerusalem) is a key component of the national strategy. From providing technical assistance and organizational development, the private sector has been working to strengthen their institutional capacity to be better service membership base in specific the wider sector in general.

Training and upgrading the human resource capacity is also a key area of focus. As a service oriented industry, tourism relies heavily on providing high quality services to visitors. There are multiple capacity building and training program underway and in planning to train and upgrade the capacities of the tourism workforce (public, private & civil) across the value chain.

#### **Pillar IV: Marketing & Promotion: *Palestine as a tourism destination:***

Until the Palestine Tourism Board is established, it is the Ministry of Tourism & Antiquities (in close cooperation with the private sector) that is taking the lead in Palestine's destination marketing and promotion. A comprehensive and integrated marketing and communication plan is being developed together with the private sector and key stakeholders. The strategy includes positioning Palestine as a viable and attractive tourism destination that is rich in religious, cultural, historical and natural treasures. A diverse mix of activities are underway and planned for the coming year including participation in key international exhibition, hosting of familiarization tours (travel agents, religious leaders and media). Online marketing and promotion is another key component of the mix.

#### **2011 Project Highlights**

This year saw the start or completion of a wide range of project and initiatives across the West Bank. The main highlights:

- **UNESCO:** Palestine's admittance as a full member in UNESCO. From purely a tourism perspective, this will give Palestinians the right to nominate key historic or ancient sites for inclusion on the world heritage register.

Recently, we have launched a campaign to place the city of Bethlehem on the World Heritage List, seeking to protect and preserve the area's landmarks. In parallel, the Ministry of Tourism and Antiquities is working on the preparation of another nomination file for Hebron, which will be submitted to the World Heritage Center in 2012.

- **Bethlehem Master Plan:** In 2011, the Ministry of Tourism together with the Bethlehem Chamber of Commerce and Industry launched the Bethlehem Tourism Development Action Plan. The initial phase of the project was 6 months and aimed at identifying immediate short terms interventions and actions that can enhance the overall visitor in Bethlehem. A special working group was set up by the Ministry of Tourism and included representatives from over 14 institutions and organizations working in tourism within the governorate. A complete overview of the project is available at [www.masterplan.ps](http://www.masterplan.ps)

- **Product Development:** In terms of developing the overall tourism offer, the ministry has been actively renovating and restoring key sites such as Hisham's Palace and Tell Al-Sultan in Jericho. Tell Balata site development is also underway and includes developing paths, a small museum, and an information center to cater to visitors. Several new museums are also being developed, including the Samaritan Museum in cooperation with UNESCO, Dura near Hebron, Al-Bad in Bethlehem, and the Al Riwaya Museum in Bethlehem's Peace Center.

- **Marketing:** In 2011 we have intensified our marketing and promotional activities locally, regionally, and internationally. One of the main activities is participation in key international tourism exhibitions and fairs. Together with the private sector, the Ministry has organized Palestine's participation at more than twenty international shows in traditional and new markets targeted through trade shows and exhibitions.

In addition, a new set of tourism promotion films were produced portraying a new image of Palestine as a tourist destination. The three newly produced films will be used for advertising, sales and documentarily purposes.

- **Domestic Tourism:** On the domestic Tourism front, the Ministry has also just finalized a comprehensive review of domestic tourism. The study examined the untapped potential of domestic tourism across the country and identified both national actions and more localized tourism development opportunities in the various governorates. The final report will be published beginning of 2012.