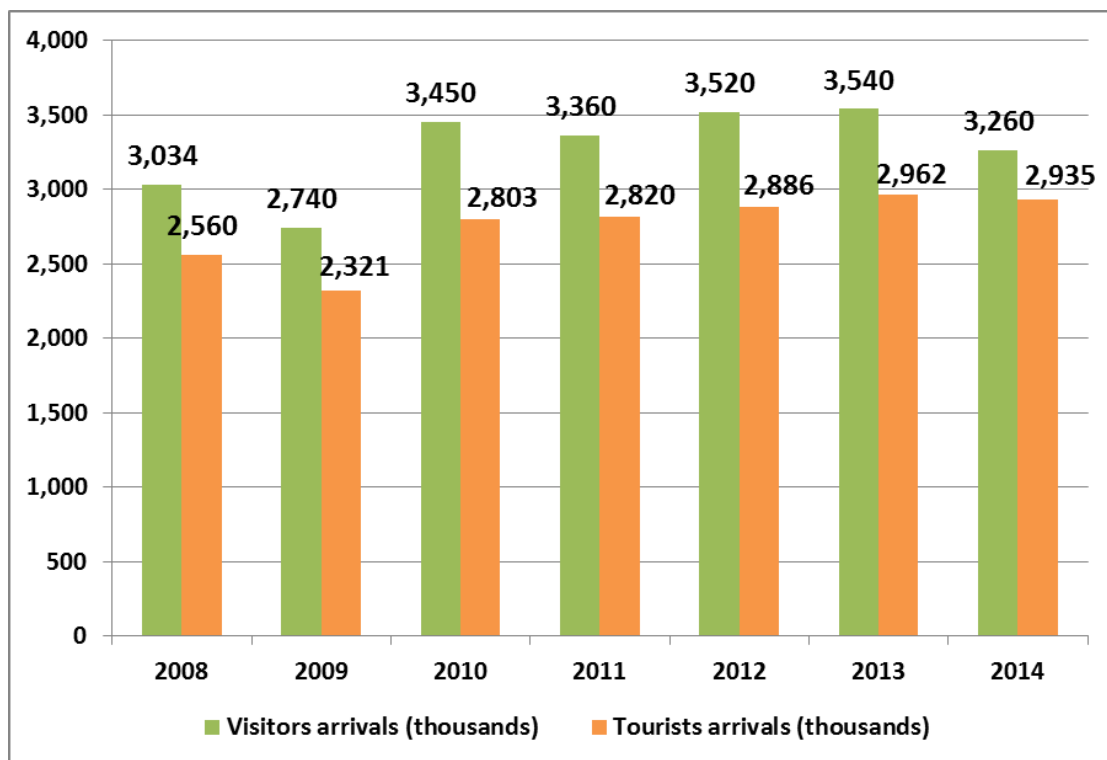


**Detailed breakdown of  
Israeli Tourism in 2014.**

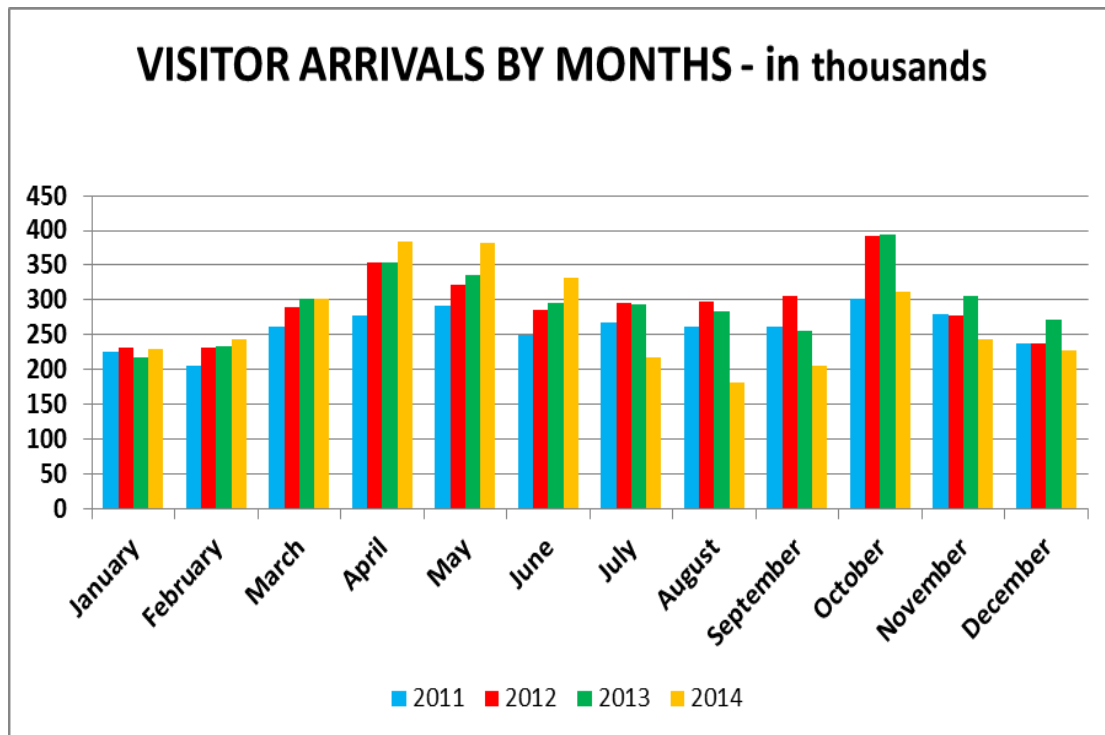
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About 3.3 million visitors to Israel arrived in Israel in 2014, 7% less than the record year of 2013. The number of tourist entries (not including day visitors) totaled about 2.9 million entries, a decrease of less than one percent compared to 2013.



The year 2014 was characterized by steady increases in the months January-June 2014. The accumulated increase of the first half of 2014 for visitors stands at 8%; and for tourists (those staying more than one night) was greater - 18%. This momentum was halted and reversed with the onset of Operation Protective Edge in July 2014. Sharp decreases in incoming tourism were recorded from July 2014 (about 30%), stabilizing to about 20% decrease in the last months of 2014.



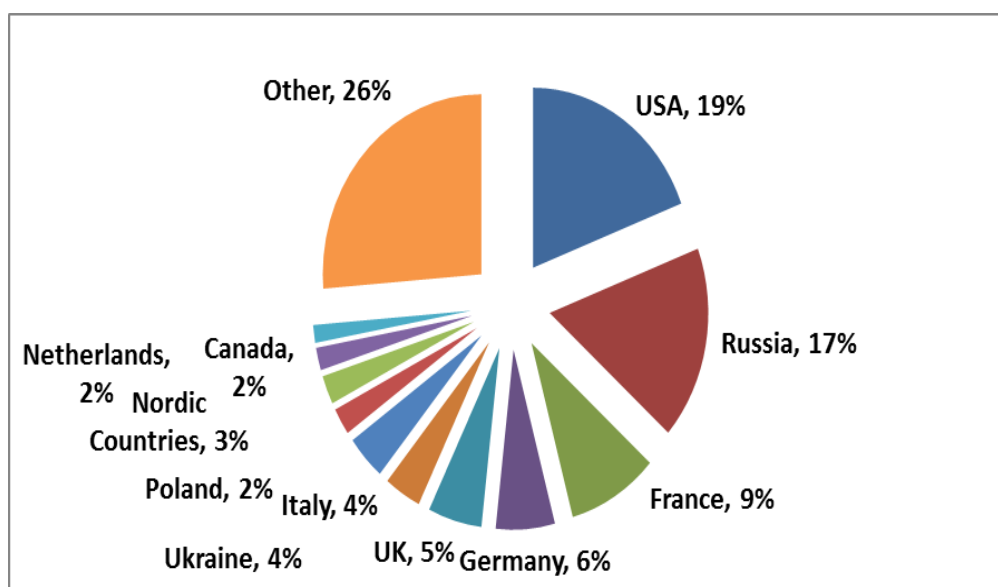
### **1. Tourism by mode of travel**

Out of 3.3 million visitors, 2.5 million arrived by air (78%), a decrease of 2% compared to 2013. About 400,000 came through the land borders (12%), a 5% increase compared to 2013. 240,000 entries (7%) were day visitors, a decrease of 26%: of these 90,000 (3%) came on cruise ships, a 65% decrease compared to 2013. The cruise ship sector was most affected by Operation Protective Edge (even though the decrease was evident in the first half of 2014 as well.)

### **2. Tourism by Country of Origin (visitors, including day visitors and cruise ships)**

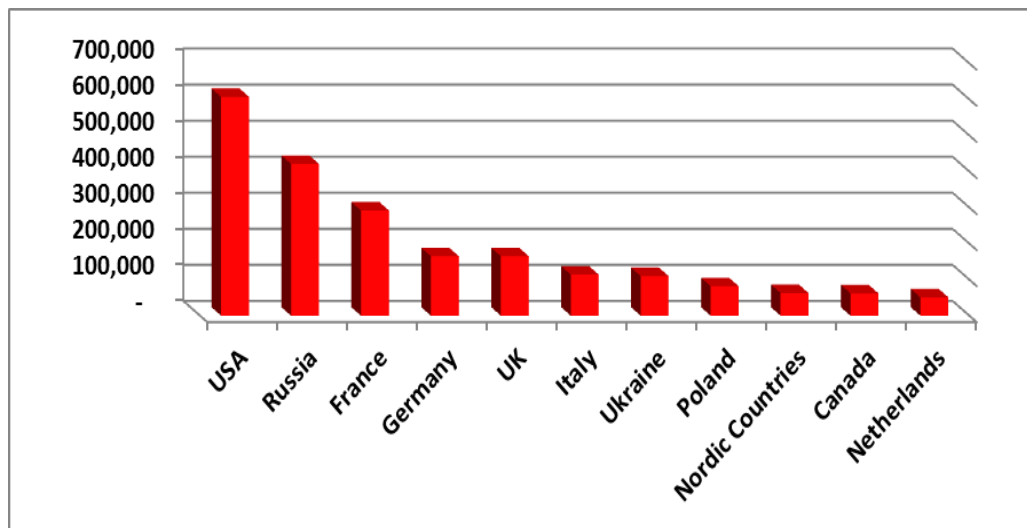
As in previous years, tourism from the **USA** continued to represent the largest country of origin for incoming tourism to Israel, with 626,000 visitors arriving in 2014, (representing 19% of all incoming tourism), 1% more than 2013. In second place is tourism from **Russia** with 567,000 visitors, a decrease of 6%. Tourism from **France** takes third place, with about 301,000 visitors 5% less than 2013, followed by **Germany** (196,000; 23% less than 2013) and the **United Kingdom** with 179,000 visitors, 18% less than 2013.

Other countries worthy of note: **Italy** with 122,000 visitors, 29% less than 2013; **Ukraine** with 132,000 visitors, no change on 2013; **Poland**, 79,000 visitors, 12% less than 2013; 66,000 visitors from **Canada** (a decrease of 7%); from the **Netherlands** 52,000 visitors, 8% less 2013.



### **3. Leading Countries of Origin (tourists, excluding day and cruise visitors):**

In first place, **USA** with 608,000 tourists, 2% more than last year. In second place, **Russia** with 420,000, 4% more than last year. In third place, **France** with 290,000, (no change on last year). In fourth place, **UK** and **Germany** with 165,000, **Italy** with 114,000, **Ukraine** with 110,000, **Poland** with 63,000, **Canada** with 62,000 and **the Netherlands** with 51,000.



#### 4. Tourism to Israel: Characteristics\*\*

- 56% of incoming tourism was Christian tourism (41% of which is Catholic, 26% Protestant and 22% Russian Orthodox), 24% Jewish tourism, with the remaining of other religious denominations or non affiliated.
- 58% of tourists were first time visitors, and 42% returning visitors.
- 21% defined their visit as part of a pilgrimage, 26% as tour and travel, 11% as vacation and leisure. Overall, 58% defined their visit for tourism purposes, 23% visited friends or relatives and 11% came for business or to attend conventions.
- 27% came as part of an organized tour, 10% on a package deal, and 63% came as FITs (frequent individual tourists).
- 64% of tourists stayed in hotels, 22% stayed with friends or relatives and 5% stayed in youth hostels, 1% stayed in religious hostels. 6% stayed in rented or owned apartments.

#### 5. Sites/Cities Visited\*

Jerusalem is the city most visited by incoming tourists in Israel, (82% of all tourists). Tel Aviv-Jaffa holds second place with 67% of all tourists having visited and in third place, the Dead Sea area with 54%. Tiberias and the Sea of Galilee holds fourth place with 38% of all tourists followed by the Galilee area with 34%.



The most visited sites in 2014 include the Western Wall (74%), the Jewish Quarter in Jerusalem (68%), the Church of the Holy Sepulcher (59%) and the Via Dolorosa (53%) and the Mount of Olives (52%).

#### 6. **Tourist Satisfaction**

The satisfaction level of tourists visiting Israel in 2013 was very good to excellent (4.3 out of 5 – excellent). Services that received a high rating included: archeological sites (4.5); tour guides and organized tours (4.4); personal security (4.3). Among those services which did not rate so highly: public bathrooms (3.5), taxis (3.4), and value for money (3.1).

#### 7. **Hotels**

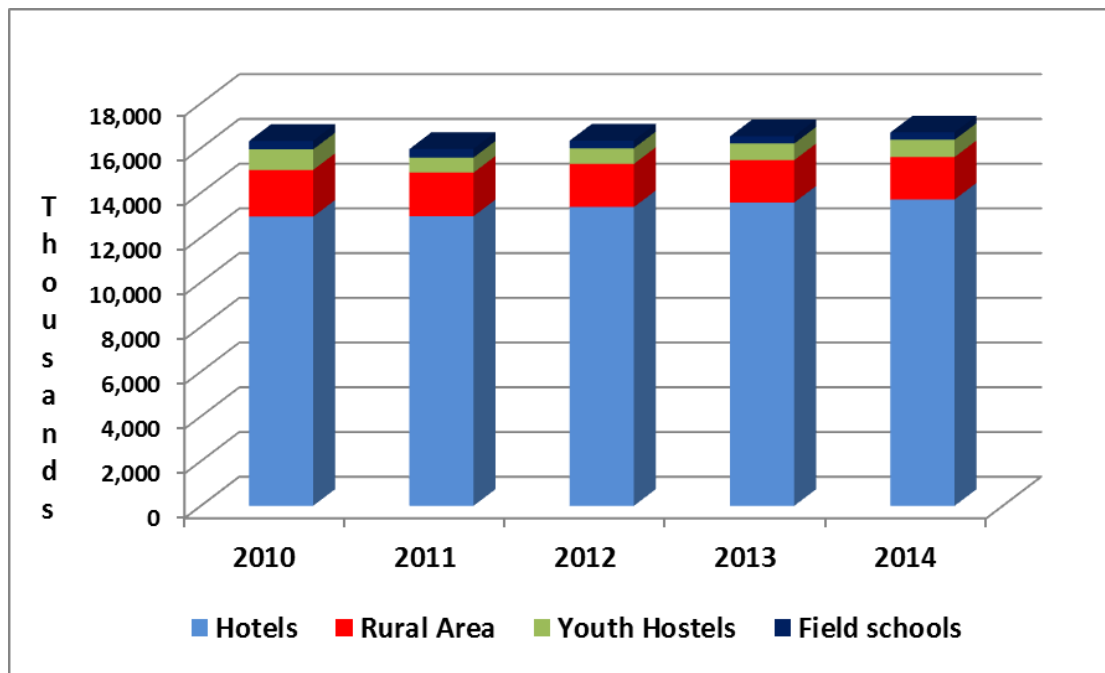
During 2014, 360 hotels operated in Israel with a total of about 49,610 rooms. 75 hotels with 9,800 rooms operated in **Jerusalem**, 50 hotels with 11,000 rooms in **Eilat**, 57 hotels with 7,100 rooms in the **Tel Aviv** area, 15 hotels in the **Dead Sea** area with over 4,000 rooms and 49 hotels with 6,300 rooms in the **Tiberias and Sea of Galilee** area.

22 million bed nights were registered in these hotels through 2014, a slight decrease (1%) on 2013. About 41% of these were from incoming tourists (9.2 million bed nights, 5% less than 2013). Since 2008, there has been a trend in tourist bed nights, away from tourist hotels into other accommodation (youth hostels, Christian hostels and privately-owned/rented apartments). About 13 million bed nights (59% of the total) were from Israelis, an increase of 1% on 2013.

#### 8. **Domestic Tourism**

About 16.7 million domestic overnight stays were registered in 2014 in all the various types of accommodation, 2% more than last year (16.5 million). There was an increase of 3% in hotel stays (13.7 million overnight stays). Rural tourism registered 1.9 million bed nights (no change on 2013), 770,000 Israeli bed nights in youth hostels (4% increase), 330,000 bed nights in field schools (almost no change on 2013 - 327,000).

It should be noted that there was an 8% increase in the numbers of Israelis traveling overseas in 2013 (4.8 million) as compared to 2013. Of those Israelis, 4.6 million traveled overseas by air (10% increase).



## 9. Tourism's contribution to the Israeli economy

Revenue from incoming tourism in 2014 (including the income of the Israeli aviation companies from inbound tourism) totals about \$5 billion or NIS 19 billion (a decrease of 2% - there was an increase in revenue in the first half of 2014, and a decrease in the second half, due to the increase in the dollar rate and the decrease in shekels was relatively small). Revenue from domestic tourism in 2014 totals about NIS 12 billion (2% more than in 2013), with another NIS 10 billion from outgoing tourism, a slight increase on last year. Total revenue from tourism in 2014 is estimated at about NIS 41 billion, a slight decrease on 2013.

The number of employees in the Israeli economy as a result of tourism activities totals about 110,000 in 2014, approximately one third of whom are employed in hotels. The total number of employees in the tourism industry (direct and indirect) stands at about 200,000, 6% of all employees in Israel.

**Sources, tables and graphs: Ministry of Tourism Statistics Department**

**\* Estimates based on statistics for January-November 2014 inclusive**

**\*\* Based on the Inbound Tourism Survey, January-June 2014**