



# TOURISM IN ISRAEL

2000-2013



הלשכה המרכזית לסטטיסטיקה  
Central Bureau of Statistics  
دائرة الإحصاء المركزية



# Incoming tourism

## Number of visitors

- In 2013, the number of international tourist arrivals increased by 5% compared with 2012, and amounted to over one billion arrivals. The number of tourist arrivals to Europe, the most visited region in the world, was 5% higher than in 2012. In the Middle East the number of tourist arrivals in 2012 decreased by 5%, and remained unchanged in 2013 (source: UNWTO).
- In Israel the number of incoming tourists is generally rising, alongside with periods of downtrends: in the 1950s there was an average of 47,000 tourist arrivals a year; in 2000-2013 the annual average was 2.1 million. Since the establishment of the State of Israel there have been approximately 68 million tourist arrivals, 85% of them since the 1980s. Israel's attractiveness to tourists can be attributed to the large number of religious, natural and cultural sites concentrated in a small area, as well as to its extensive touristic infrastructure and temperate climate.
- The most serious crisis in tourism to Israel occurred at the turn of the 21<sup>st</sup> century. The expectation for rapid growth in incoming tourism in 2000 was upset by the outbreak of the Second Intifada (2001-2003). Afterwards, there was a general trend of recovery in tourism.
- In 2013, the number of visitor arrivals to Israel amounted to 3.5 million – 3.0 million tourist arrivals and 578,000 arrivals of day visitors.
- 44% of all day visitor arrivals were by sea, 34% - via land border crossings, and 22% - by air.

### 1 Visitor arrivals (tourists and day visitors), millions, 2000-2013



### 2 Visitor arrivals, by route, 2013

	All visitors	Tourists	Day visitors
Thousands			
All arrivals	3,540	2,962	578
Via air	2,706	2,580	126
Via land	577	382	195
Via sea	257	-	257
Percentage of change 2013/2012			
All arrivals	1%	3%	-9%
Via air	5%	4%	40%
Via land	-17%	-6%	-34%
Via sea	2%	-	2%

# Incoming tourism

## Characteristics of the visitors

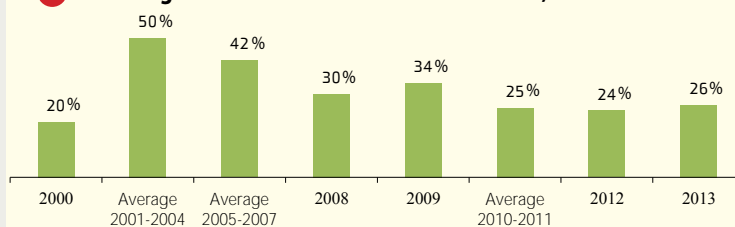
- 60% of all tourist arrivals in 2013 were from European countries, 27% - from American countries (20% from the USA), 9% - from Asia, 2% - from Africa and 1% - from Oceania. Until the early 1970s, most tourists were from America, and in later years more than half of them were from Europe.

### 3 Tourist arrivals from selected countries, 2000-2013

Country of origin	2000	Average 2001-2004	Average 2005-2007	2008	2009	Average 2010-2011	2012	2013	% change 2013/12
Total (thousands)	2,417	1,157	1,930	2,560	2,321	2,812	2,886	2,962	3
Total (percentages)	100	100	100	100	100	100	100	100	
Thereof: USA	20	24	26	23	23	21	20	20	2
Russia	7	4	5	8	10	12	13	14	6
France	8	15	14	10	11	10	9	10	11
UK	8	11	8	7	7	6	6	6	5
Germany	7	5	5	5	6	6	5	5	1
Italy	3	2	4	5	5	4	4	4	1
Ukraine	2	2	2	2	2	3	4	4	-1

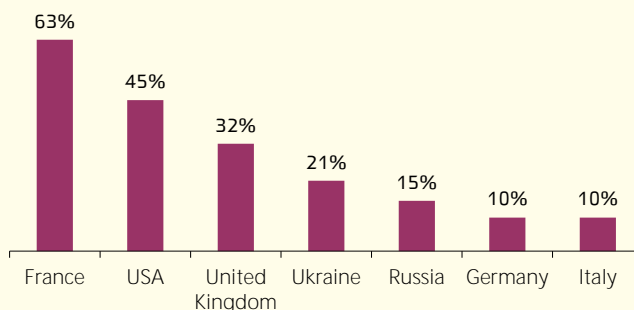
- 58% of the arrivals of day visitors by land and 64% of the arrivals of day visitors by air were recorded for citizens of Russia.
- 35% of the arrivals of day visitors by sea (cruise passengers) were recorded for citizens of Germany.
- In 2013, Jewish tourists constituted 26% of all tourists, compared to 24% in 2012.<sup>1</sup>

### 4 Percentage of Jewish tourists out of all tourists, 2000-2013



- There are differences in the share of Jews among tourists from various countries of origin. Out of all French tourists arriving in 2013 Jews constituted 63%, whereas among Italian tourists the share of Jews was only 10%.

### 5 Percentage of Jewish tourists out of all tourists, by country of origin, 2013



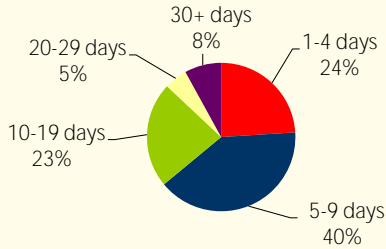
<sup>1</sup> Data on religion of tourists were obtained from a survey conducted for the Ministry of Tourism among tourists who departed the country in 2013.

# Incoming tourism

## Characteristics of visits<sup>1</sup>

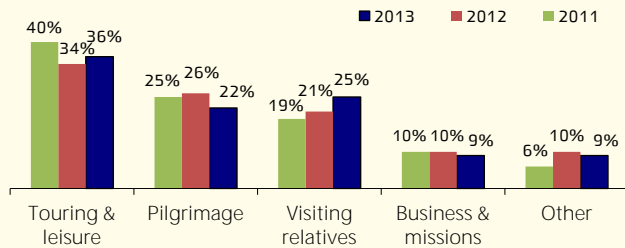
- 92% of all tourists who arrived in Israel in 2013 stayed in the country less than one month, similar to 2012. On average their stay lasted 8.1 days.

### 6 Tourists, by duration of visit, percentages, 2013



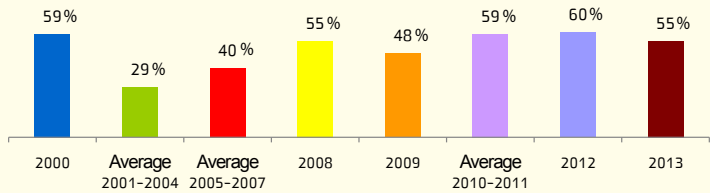
- 36% of the tourists who came to Israel in 2013 came primarily for touring and leisure (in 2012 - 34% and in 2011 - 40%).

### 7 Tourists, by main purpose of visit, percentages, 2011-2013



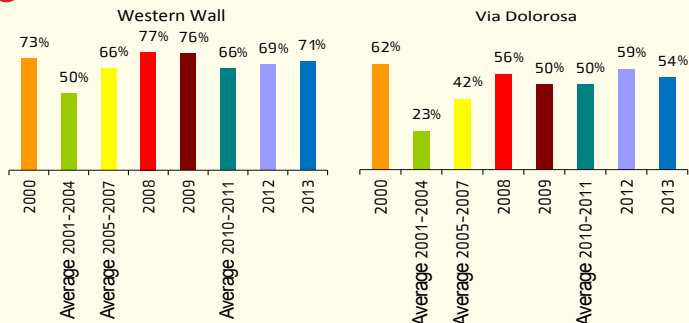
- With the recovery in tourism that followed the slump in 2001-2003, there has been a steady increase in the share of tourists who arrived in Israel for the first time (55% in 2013).

### 8 Tourists who visited Israel for the first time, percentages, 2000-2013



- In 2013, 79% of all tourists visited Jerusalem, 66% - Tel Aviv-Yafo, 54% - the Dead Sea Shore, 40% - Tiberias and the Sea of Galilee, 28% - Haifa and 12% - Eilat.

### 9 Tourists who visited the Western Wall and Via Dolorosa, percentages, 2000-2013



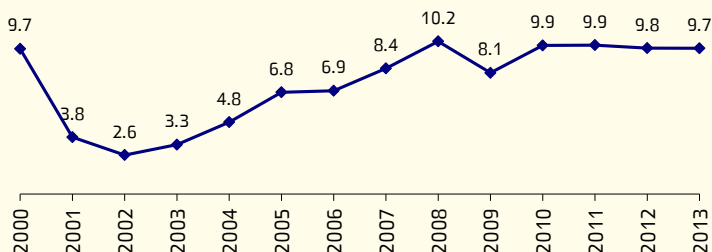
<sup>1</sup> Data were obtained from a survey conducted for the Ministry of Tourism among tourists who departed the country in 2013.

# Incoming tourism

## Tourist-nights<sup>1</sup>

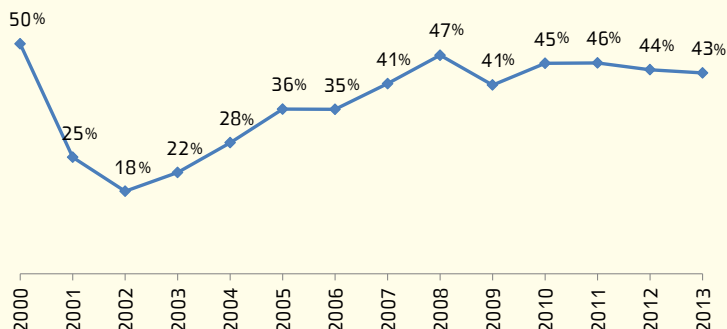
- The number of tourist-nights in tourist hotels in 2013 was approximately 9.7 million, a little less than in 2012.

**10 Tourist-nights in tourist hotels, millions, 2000-2013**

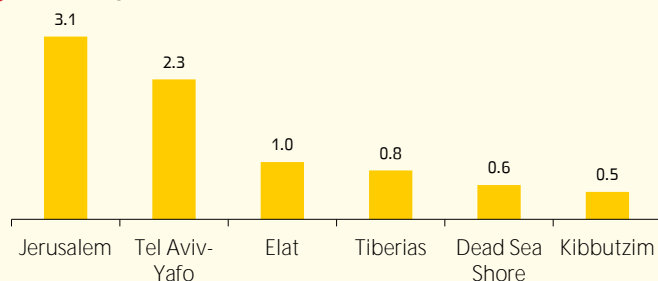


- Between 1990 and 2000 tourist-nights constituted 50% of all person-nights in tourist hotels, on annual average; in the slump years 2001-2003 their share decreased to 22%. Afterwards, the percentage of tourist-nights increased, and reached 47% in 2008. In 2009, it decreased to 41%, and in 2010-2013 it was 45% on the average each year.

**11 Tourist-nights, percentage out of total person-nights in tourist hotels, 2000-2013**



**12 Tourist-nights in tourist hotels in selected localities, millions, 2013**



- More than half of all tourist-nights in Israel in 2013 were in Jerusalem and in Tel Aviv-Yafo (31% in Jerusalem and 24% in Tel Aviv-Yafo).
- In Jerusalem and in Tel Aviv-Yafo tourist-nights constitute approximately 80% of all person-nights, in Netanya - 70%, in the kibbutzim - 33%, in the Dead Sea Shore - 25% and in Elat - 14%.

<sup>1</sup> Person-nights of foreign tourists in tourist hotels (recommended by the Ministry of Tourism).

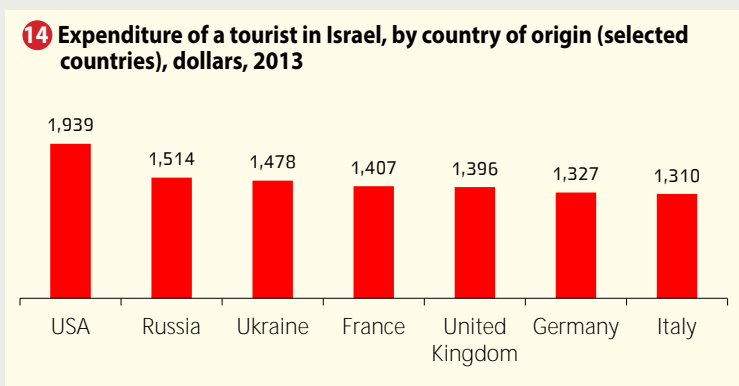
# Incoming tourism

## Income from tourism<sup>1,2,3</sup>

- In 2013 income from tourists totaled \$4.6 billion – a 5% increase compared with 2012 (\$4.3 billion).



- The average expenditure of a tourist visiting Israel in 2013 was \$1,554 (including amounts paid abroad).
- The average expenditure of a tourist from South and Central America was \$2,036, from North America - \$1,939, from Africa - \$1,701, from Asia - \$1,409, and from Europe - \$1,375.
- 41% of the expenditures of a tourist in Israel in 2013 were on accommodation, 16% – on shopping, 16% – on transportation, 12% – on food and beverages and 15% – on other expenses.



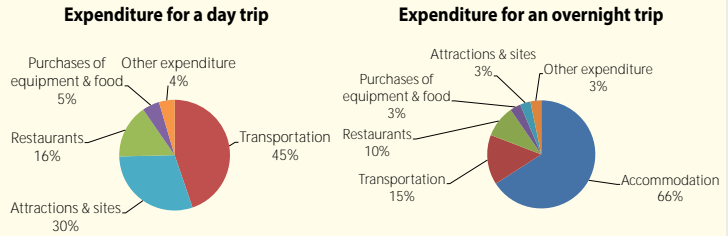
- 1 The prices on this page are current prices in US dollars. Some of the changes in financial data over the years may derive from fluctuations in the dollar exchange rate. In 2012 the exchange rate was NIS 3.9 to the dollar, and in 2013 it was NIS 3.6 to the dollar.
- 2 Excluding income of Israeli air carriers from air fare of tourists.
- 3 The estimate of Israel's income from tourism is based on the average expenditure of a tourist.

# Domestic tourism

## Trips<sup>1</sup>

- Domestic tourism refers to trips of Israelis in Israel - day trips (56% of all trips) and overnight trips, which include person-nights in accommodation services, staying with friends and relatives, or elsewhere (44% of all trips). Accommodation services include hotels (tourist hotels and other hotels), rural tourism, youth hostels, and field schools.
- In 2012, the average expenditure per person was NIS 133 for a day trip in Israel, and NIS 831 for an overnight trip in Israel. Regarding overnight trips, the expenditure for the accommodation comprised 66% of the total trip expenditure.

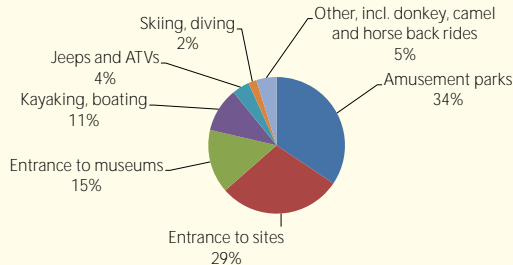
### 15 Expenditure per person for a day or an overnight trip,\* percentages, 2012



\*The expenditure on organized trips was distributed between the relevant items.

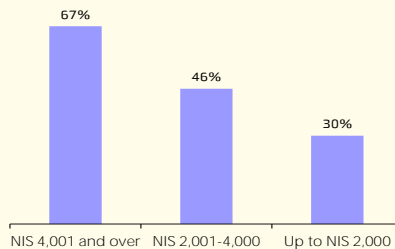
- 34% of all visits at attractions and sites during a trip were entries to amusement parks, 29% were entries to sites, and the rest were visits to other attractions.

### 16 Visits to attractions and sites during a trip, percentages, 2012



- The primary means of transportation for trips in Israel is a private car (79%); 14% of the travellers use a bus, and approximately 2% use a rented car. The rest use other means of transportation.
- In 2013, 50% of the Israelis aged 20 and over went on an overnight trip. This percentage decreases with age - 56% of those aged 20-44, 48% of those aged 45-64, and 35% of those aged 65 and over. The percentage of those going on a trip increases with income.

### 17 Persons aged 20 and over who took a vacation or went on an overnight trip in Israel at least once in the last year, by monthly income per capita, percentages, 2013



1 There is a likelihood of under-reporting one-day trips, due to the tendency to forget them.

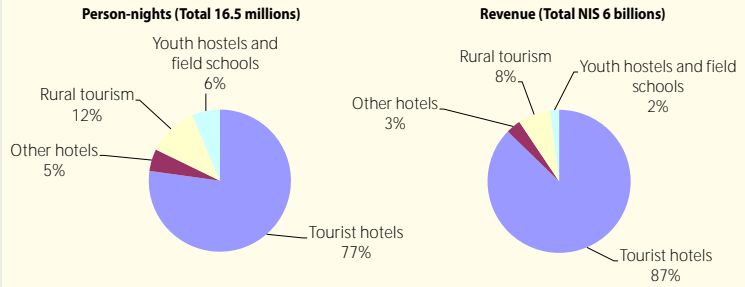
- 92% of all overnight trips of Israelis in Israel are for the purpose of travel and vacation, 4% are for visiting friends and relatives, and 3% are for business.

# Domestic tourism

## Person-nights

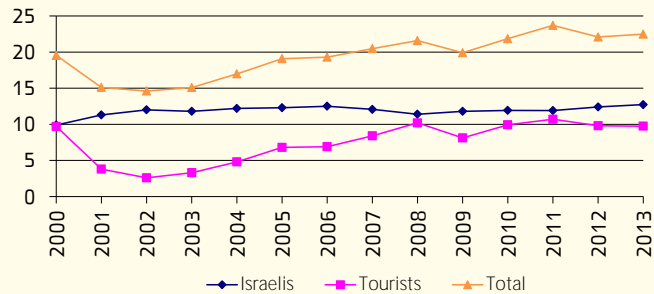
- In 2013, Israelis took approximately 7.1 million overnight trips in Israel. The number of person-nights in accommodation services in these trips was 16.5 million. The average number of person-nights per trip was 2.3.

### 18 Israeli person-nights in accommodation services and revenue of accommodation services from Israelis,<sup>1</sup> by type, 2013



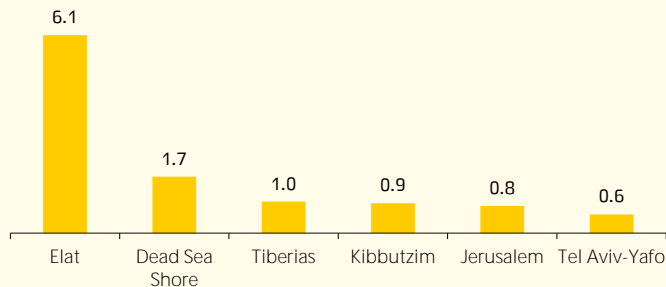
- Israeli person-nights in tourist hotels comprise 77% of the total Israeli person-nights at the various types of accommodation services.
- Between 2000 and 2013 the number of Israeli person-nights increased by 29% (from 9.9 to 12.7 million), while the number of tourist-nights fluctuated. Since 1997 the number of Israeli person-nights exceeds that of tourist-nights.

### 19 Person-nights in tourist hotels, millions, 2000-2013



- 48% of all Israeli-nights in 2013 were in Elat, 14% - in the Dead Sea Shore, 7% - in Jerusalem, 4% - in Tel Aviv-Yafo, 7% - in the kibbutzim and 8% - in Tiberias.

### 20 Israeli person-nights in tourist hotels in selected localities, millions, 2013

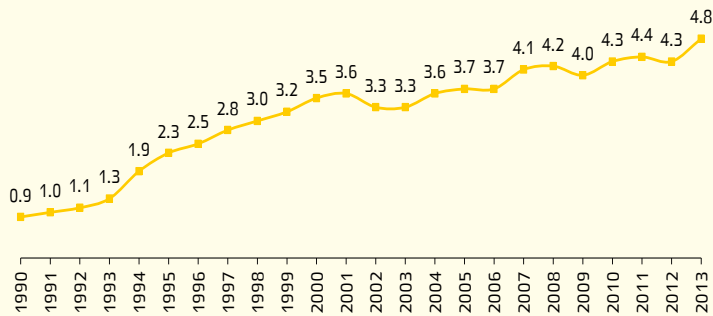


<sup>1</sup> Revenue from Israelis also includes revenue from services, such as celebrations and conferences.

## Departures abroad of Israelis

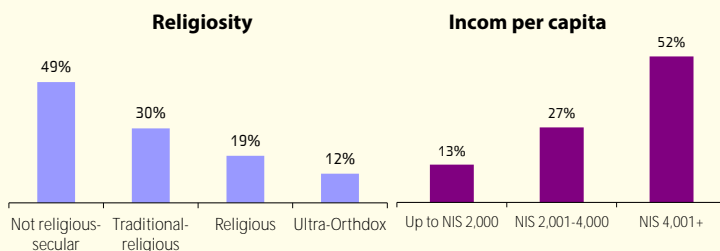
- In 2013, 2.6 million Israelis departed abroad (a 8% increase compared to 2012). 1.7 million departed abroad once, and 0.9 million departed abroad twice or more during the year.
- The number of departures abroad of Israelis in 2013 was 4.8 million - a 9% increase compared to 2012.

**21** Departures abroad of Israelis, millions, 1990-2013



- 90% of all departures abroad were by air, 8% were by land and 2% - by sea.
- Of all departures by land, 67% were through border crossings to Jordan and 33% - through the border crossing with Egypt.
- In July and August there were approximately 1.3 million departures - 27% of all departures.
- Departures of children aged 0-14 comprised 18% of all departures in the months of July and August, compared to 10% in 2013 as a whole.
- In 2013 there were 4.7 million returns of Israelis from abroad - 29% were after a stay which lasted up to 4 days, 59% - after a stay of 5-29 days and 12% - after a stay of 30 days or more.
- In 2013, 33% of all those aged 20 and over reported they had departed on a vacation or a trip abroad at least once during the last year.

**22** Persons aged 20+ who departed abroad at least once last year, by monthly income per capita and by religiosity (Jews), percentages, 2013



## Departures abroad of Israelis (cont.)

### Departures abroad by destination country

- Data on the departures abroad of Israelis are obtained from the border control system and do not include the flight destination. "Mirror statistics" were employed in order to examine which countries are visited by Israelis. This method is based on the data on the arrivals of tourists or visitors that the World Tourist Organization (UNWTO) receives from various countries. Among the countries that do not report to the UNWTO are Spain and France, which are destinations with a high frequency of Israeli visitors.
- According to the reported data, the USA is the country most visited by Israelis. Turkey (which is not listed in the table below) was the country most visited by Israelis until 2009 (over half a million visits by Israelis in 2008). Since 2009, there has been a major decline in the number of Israeli visits to Turkey (79,526 in 2012, a decrease of 85% compared with 2008).

**23** Number of arrivals of Israeli tourists to selected destination countries, thousands, 2009-2012

Destination country	2009	2010	2011	2012	% Change 2012/2011
USA *	308.2	306.9	302.7	303.6	0.3
Greece *	82.4	197.2	226.1	207.7	-8.1
Jordan *	185.5	197.3	172.5	162.8	-5.6
UK	158.0	158.0	164.0	137.9	-15.9
Egypt	203.3	226.5	177.8	132.2	-25.6
Thailand *	111.2	116.0	125.1	125.7	0.4
Russia	89.1	100.3	114.4	124.0	8.4

\* Excluding day visitors.

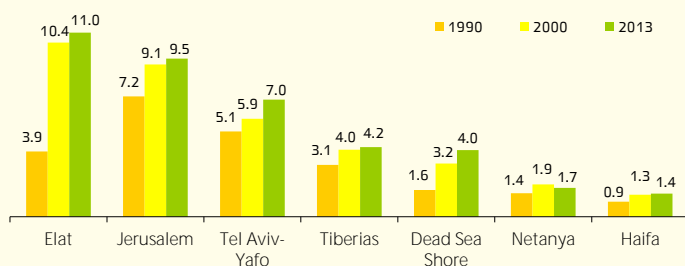
Source: UNWTO

## Accommodation services

### Rooms in tourist hotels<sup>1,2</sup>

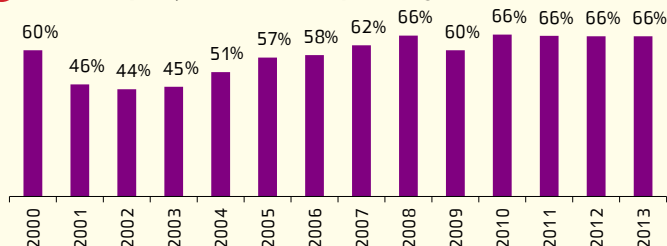
- In the 1990s, following an increase in the number of tourists, both from abroad and Israel, and expectations for a record number of tourists in 2000, a large number of rooms were built in tourist hotels. From 1990 to 2000 the number of rooms increased by 53%. The volume of room construction in hotels sharply decreased in 2001, following the second Intifada. In 2001-2013 there was almost no change in the number of rooms.
- The rooms in tourist hotels (48,000 rooms in 357 hotels) comprised 77% of all accommodation rooms in Israel. The other rooms were in other hotels (6%), in youth hostels (2%), in Christian hostels (2%), in rural tourism (12%), and in field schools (1%).
- The average number of rooms per tourist hotel increased from 34 in the early 1960s to 136 in 2013.
- In tourist hotels, the average number of beds per room is 2.4, compared to 3.7 in rural tourism, field schools and youth hostels.
- Until 1996, Jerusalem had the highest number of rooms; since 1997 it is Elat.

**24 Rooms in tourist hotels in selected localities, thousands, 1990, 2000, 2013**



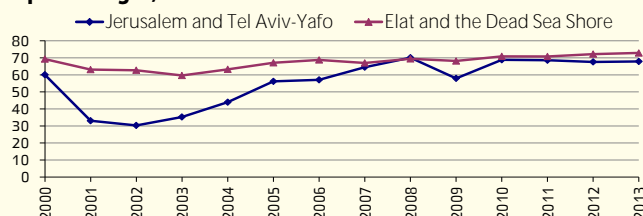
### Room occupancy<sup>3</sup>

**25 Room occupancy in tourist hotels, percentages, 2000-2013**



- In cities such as Tel Aviv-Yafo and Jerusalem, where tourism is mainly from foreign countries, room occupancy in the last decade was highly influenced by changes in the level of security in Israel and in the global economy, and therefore unstable. In localities highly dependent on internal tourism, such as Elat and the Dead Sea Shore, occupancy was stable.

**26 Room occupancy in tourist hotels in selected localities, percentages, 2000-2013**



- 1 Hotels registered at the Ministry of Tourism.
- 2 Including rooms temporarily closed (7% of all rooms, on average in 2000-2013).
- 3 Excluding hotels temporarily closed.

## Accommodation services

### Revenue<sup>1</sup> and employment

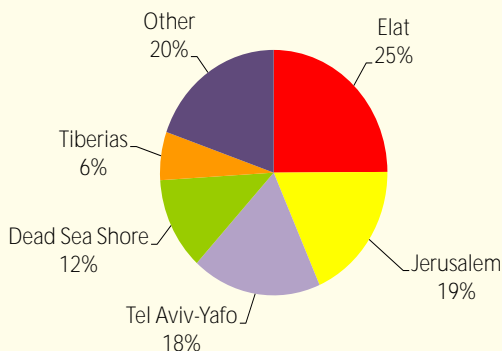
- In 2013, the revenue of tourist hotels amounted to NIS 9.3 billion, 0.5% lower in constant prices, CPI adjusted, than the revenue in 2012. The revenue from tourists was NIS 3.9 billion - 4% lower than in 2012, and the revenue from Israelis<sup>2</sup> was NIS 5.4 billion - 2% higher than in 2012.

**27 Revenue of tourist hotels, NIS billions, 2000-2013**



- In 2013, the revenue from tourists was 42% of the total revenue.
- The revenue from a tourist-night was \$115.
- The annual revenue from a room was \$54,000.
- 37% of the revenue was from hotels in Elat and the Dead Sea Shore, and 37% - from hotels in Jerusalem and Tel Aviv-Yafo.

**28 Revenue of tourist hotels in selected localities, percentages, 2013**



- In 2013, revenue from rural tourism was NIS 547 million, a 0.5% increase compared to 2012.
- The average price per person-night in rural tourism was NIS 241; in the kibbutzim and the collective moshavim it was NIS 228 and in a private rural accommodation it was NIS 260.
- In 2013, 29,600 persons were employed in tourist hotels, and additional 4,400 workers were hired by employment agencies.
- The average monthly wage per hotel employee was NIS 6,900, compared with NIS 5,000 per worker employed by an employment agency.

1 In 2013 prices, general CPI adjusted.

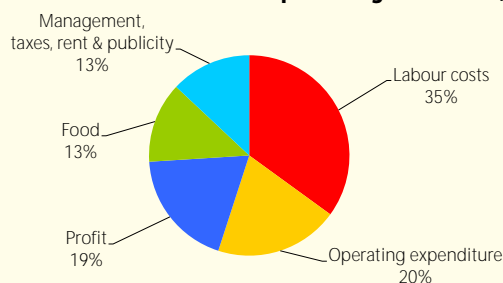
2 Revenue from Israelis also includes revenue from services, such as events and conferences.

## Accommodation services

### Income, expenditure and profit<sup>1</sup>

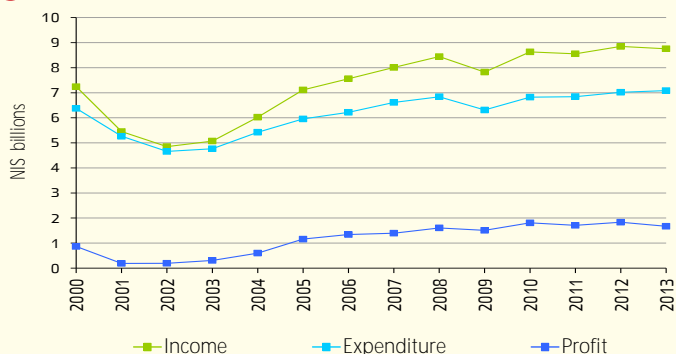
- In 2013, the profit<sup>2</sup> of tourist hotels (surplus of income over expenditure) reached NIS 1.7 billion – 19% of the income.
- The income of tourist hotels is obtained from rental of rooms (50%), from food services for hotel guests and outside clients (40%) and from other sources, such as operation of store and clubs, and organization of events and conferences (10%).
- Expenditures consist of labour costs (40%-45%), purchase of food (12%-16%), and other components such as maintenance, management, taxes, rent, and publicity.
- Food purchases comprise, approximately 35% of the income from food, with the rate ranging from 50% in popular hotels to 30% in deluxe hotels.
- Expenditures on taxes, fees and insurance comprise 6% of the total income (regardless of level of hotel), compared with 3% spent on publicity and sales promotion, 1.5% on culture and entertainment, and 1.5% on management (from 0.8% in popular hotels to 1.7% in deluxe hotels).

#### 29 Expenditures of tourist hotels as a percentage of income, 2011



- From 1991 to 2000 there was a steady increase in the revenue of hotels, accompanied by a concomitant increase in expenditures. During that period, hotel profits ranged from 10% to 19% of the income.
- During periods of crisis in tourism, the income of hotels decreases more rapidly than the expenditures. When a crisis begins, reservations are immediately cancelled while expenditures – particularly the labour cost – do not shrink as fast. In the 2001 crisis, the income of hotels dropped by 25% and the expenditures only by 18%. In 2002, income and expenditures dropped by 11% each. The profit dropped from 12% in 2000 to 4% in 2002. In the years 2003-2013 (except in 2007 and 2009), income and expenditures increased, and the increase in income was faster – a phenomenon which characterizes recovery.
- In 2010-2013 the profit comprised about 20% of the income.

#### 30 Income, expenditure and profit of tourist hotels, NIS billions, 2000-2013



1 The last survey was carried out in 2011. For 2012-2013 estimates were calculated.

2 In 2013 prices, general CPI adjusted.

## Tourist Attractions

- Tourist attractions provide a major incentive for tourists, and are the main reason for the existence of the country's tourism industry. Essentially, without these attractions there would be almost no need for the tourism services (e.g. accommodation and transportation services). The extent of tourism (both incoming and domestic) is largely affected by the presence of tourist attractions. Beyond the overall contribution of tourist attractions to the development of tourism, they contribute directly to the country's economy by providing employment and generating income in foreign currency.
- Based on the Business Register of the CBS and on other administrative files,<sup>1</sup> estimates of income, employed persons, and number of visitors were calculated for some tourist attractions. In 2011, income from tourist attractions that charged entrance fees amounted to about NIS 1.7 billion (including income deriving from government allocations and donations which amount to over 50%-70% of the income deriving from attractions belonging to the Israel Nature and Parks Authority and recognized museums). The number of employed persons at these attractions was about 8,800.

### 31 Tourist attractions - income, employed persons and visits, 2011

	Income (NIS millions)	% Change 2011/2010	Employed persons (thousands)	% Change 2011/2010	Visits (millions)	% Change 2011/2010
Total	1,706.6	-1.5	8.8	-0.3	..	..
Museums	436.2	-0.5	2.1	6.5	3.0	-6.2
Nature sites & parks	523.6	-0.5	2.0	2.5	10.7	-3.1
Amusement parks, sports & other	746.8	-2.8	4.8	-4.0		

<sup>1</sup> Data are provided by the Israel Nature and Parks Authority, and from the survey of Museums in Israel conducted by the Center for Cultural Information and Research under the auspices of the Ministry of Culture and Sport.

## The economic contribution of tourism<sup>1</sup>

- The tourism industry is based mainly on accommodation services (25% of tourism output), and on air transport services (24%). Additional industries that contribute to tourism output are travel agencies (9% of the tourism output), restaurants (8%), leisure and vacation services (3%), etc.
- In 2013, the tourism consumption in Israel (of tourists from abroad and of Israelis for travelling abroad and of Israelis in Israel) was estimated at NIS 40.4 billion.
- The expenditure of tourists from abroad in Israel (including air fare on Israeli airlines) was estimated at NIS 19.3 billion - 48% of the total tourism consumption and close to 17% of the total export of services of Israel. Compared to 2012, this is a 3.5% decrease.<sup>2</sup>
- The expenditure of Israelis for trips in Israel and abroad was estimated at NIS 21 billion – 52% of the total tourism expenditure.

### 32 Economic estimates of tourism, 2010-2013

	2010	2011	2012	2013	% Change 2013/12***
<b>Total tourism consumption (NIS billions)</b>	36.4	37.9	40.4	40.4	-1.5
Incoming tourism consumption	17.9	17.8	19.7	19.3	-3.5
Consumption by Israelis*	18.5	20.1	20.8	21.1	-0.1
<b>Value Added**</b>					
From tourism (NIS billions)	22.0	22.9	24.4	24.5	-1.1
From tourism as % of GDP	2.6	2.8	2.8	2.8	..
<b>Employed persons (thousands)</b>	99	103	114	120	5.3
Employed persons as % of all employed persons	3.4	3.4	3.4	3.5	..

\* Expenditure of Israelis for trips in Israel and expenditure in Israel for trips abroad.

\*\* Basic prices.

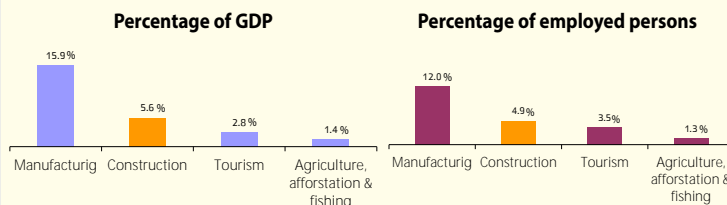
\*\*\* Constant prices, general CPI adjusted.

1 Tourism is not defined as an industry in the definitions of National Accounts and in the classification of industries. However, a methodology is used in tourism statistics (the Tourism Satellite Account), which calculates the share of tourism in various industries of the economy and by this means the product of tourism (i.e. value added of tourism). The data obtained are thus comparable with the data of National Accounts.

2 The dollar exchange rate decreased by 6.4% in 2013, compared to 2012.

- On the basis of tourism consumption, economic estimations were calculated, such as tourism output (revenue), tourism product (value added of tourism), and the number of persons employed in tourism. Thus, in 2013, the value added of tourism was estimated at NIS 24.5 billion (2.8% of the GDP) and the number of persons employed in tourism at 120,000 (approximately 3.5% of total persons employed in the economy).
- The following diagram illustrates the relative share of tourism and selected industries in the GDP and in employment.

### 33 Share of selected industries in total employed persons and in the GDP, percentages, 2013





## The Central Bureau of Statistics

Web site: [www.cbs.gov.il](http://www.cbs.gov.il)

E-mail: [info@cbs.gov.il](mailto:info@cbs.gov.il)

Phones at information centers:

Jerusalem 972-2-6592666

Tel Aviv-Yafo 973-3-5681933

**Tourism in Israel 2000-2013**