



# **Inbound Tourism Survey Annual Report 2017**

**May 2018**



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## **Foreword**

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## **Research Management**

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# ABSTRACT

## **Abstract**

This report presents the findings of a tourism survey currently conducted in Israel for the year 2017. The survey constitutes a follow-up to previous surveys, which have been conducted since 1993.

As of this year, the survey is conducted using two types of questionnaires (included in the "Sample Questionnaires in English" appendix) where questionnaire of "type 1" is conducted by a face to face surveyor, and questionnaire of "type 2" is conducted by the tourist independently answering the questionnaire using a tablet (without the assistance of the surveyor).

### **The research objectives are:**

- To gather information regarding the characteristics of tourists to Israel (country of residence, religious affiliation, age, etc.).
- To examine tourist satisfaction with different services in Israel.<sup>1</sup>
- To estimate the expenditure of tourists while in Israel.
- To identify and analyze changes compared to previous surveys.

## **A. Tourists<sup>2</sup>**

In 2017, 3,614,143 tourists **left**<sup>3</sup> Israel's border crossings.

This number is slightly different than the number published by the Central Bureau of Statistics for several reasons:

1. Different countries of origin were omitted
2. Various terminals as detailed in the methodology - Chapter 1 were omitted
3. The CBS published number of tourists includes tourist entries where the survey populations includes tourist departures

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<sup>1</sup> As of July 2017, all satisfaction sub-items (such as hotels, infrastructure, taxi services, cleanliness etc.) were omitted. This was done for 2 purposes:

**A** - Shortening the tourists' response time.

**B** - Achieving better cooperation from the respondents.

This decision was based on findings of nearly a decade of annual-ongoing surveys showing a very low variance in satisfaction of each of the specific sub items.

<sup>2</sup> Tourists are defined as stayed in Israel at least 1 night.

<sup>3</sup> This number is lower than the number published by the CBS (methodology, Chapter-1).

## **1. Characteristics of the Tourists**

### **1.1. Size of the Family Group (sampling per questionnaire)**

The average size of a family group of tourists who arrived to Israel in 2017 was 1.9 persons. 47.3% of the tourists arrived by themselves, 34.9% as part of a couple, and 17.9% as a family group of 3 persons and above.

### **1.2. Religious affiliation of the tourist**

#### **- Among all tourists**

22.4% were Jewish, 55.9% Christian, 2.8% Muslim, 0.2% Baha'i, 0.8% Hindu, 0.8% Buddhist, 1.3% belonged to other religious, and 15.8% had no religious affiliation.

#### **- Among Jews**

47.8% were Conservative, 18.1% Orthodox, 9.9% Reform, 4.8% Strictly Orthodox, 5.3% answered other and 14.1% had no denominational affiliation.

#### **- Among Christians:**

26.8% were Protestant, 41.2% Catholic, 27.5% Orthodox, and 4.5% declared other denominations.

##### **o Among Protestants:**

80.3% were Evangelist, (this group constitutes 21.5% of Christian tourists and 12.2% of all tourists), 16.1% were mainstream churches and historically black churches, and 3.5% were Methodist.

##### **o Among Orthodox:**

71.1% were Russian Orthodox and the remaining 28.9% belonged to Greek Orthodox and other Orthodox churches.

### **1.3. Age**

25.5% of the tourists were 55 or older, 19.3% were between 45 and 54 years of age, 36.0% were between 25-44, and 19.2% of the tourists were 24 or younger.

## **2. Characteristics of the visit**

### **2.1. Trip organization**

24.4% of the tourists came as part of an organized tour, 66.2% came as foreign individual tourists (FITs) not ordering land services in advance, and 9.4% purchased a package deal.

### **2.2. First / Return Visit in Israel**

55.6% of the tourists visited Israel for the first time, while 44.4% had already visited Israel. Among the latter category, approximately 54.4% had either made their previous visit to Israel up to two years before the current visit.

### **2.3. Combining the visit with other countries**

- 6.3% of the tourists visited other countries during their current trip to the region out of which 81.9% visited Jordan, 17.4% visited Egypt, 0.8% visited Turkey, 0.7% visited Cyprus, 0.9% visited Greece, and 2.5% visited another country.

### **2.4. Purpose of visit**

- 18.7% of the tourists arrived for religious purposes (pilgrimage), 24.6% came for touring and sightseeing, 25% for visiting friends and relatives, 17% for leisure and pleasure, 9.4% for business and missions, and 25.4 specified “other” as the reason of their visit.

### **2.5. Type of accommodation**

- 58.6% of the tourists stayed in hotels or holiday resorts, 23.5% stayed with friend and relatives, 4.9% stayed in youth hostels, 9.5% in rented apartments, 0.9% stayed in Christian hospices, and the remaining 2.6% reported that they used other types of accommodation.

### **2.6. Level of accommodation**

- 14.1% of the tourists stayed in a high-end accommodation, 81.4% reported a medium accommodation level, 3.3% reported a low accommodation level, and 1.1% reported “other” when asked about the level of accommodation used on their visit.

**2.7. Length of Stay:**

- The average length of stay for all tourists was 10.2 nights, and for tourists staying in Israel up to 30 days – 8.0 nights.

**2.8. Regions visited:**

Region	Percentage of tourists who visited the city/region**		Percentage of tourists who stayed at least one night**		Average length of stay*	
	2016	2017	2016	2017	2016	2017
<b>Jerusalem</b>	77%	74.0%	51%	45.3%	5.1	5.2
<b>Tel Aviv-Jaffa</b>	67%	65.3%	40%	41.5%	4.6	5.1
<b>Dead Sea Area</b>	51%	45.7%	9%	8.4%	2.1	2.2
<b>Tiberias and the Sea of Galilee</b>	36%	30.6%	22%	16.3%	2.5	2.5
<b>Galilee Area</b>	33%	28.3%	7%	4.1%	3.5	4.8
<b>Bethlehem</b>	33%	28.2%	11%	5.4%	3	3.4
<b>Nazareth</b>	30%	25.2%	7%	4.9%	2.7	2.7
<b>Haifa</b>	27%	23.6%	2%	6.2%	4.9	6.6
<b>Jericho</b>	20%	16.9%	1%	0.7%	1.8	2.2
<b>Eilat &amp; The Red Sea***</b>	9%	17.3%	9%	14.9%	3.7	4.8
<b>Golan Heights</b>	13%	9.3%	2%	1.1%	2.4	2.5
<b>Netanya</b>	10%	8.2%	5%	4.9%	6.3	9.0
<b>Negev Area</b>	8%	7.4%	4%	3.5%	3.5	4.3

\* Number of nights (average is based on tourists who have stayed a min. of 1 night).

\*\* Figures are based on the entire tourist population

\*\*\* In 2017 the figures were influenced by the expansion of activity at Ovda airport

## 2.9. Sites Visited

Sites in Jerusalem			Other sites		
	2016	2017		2016	2017
Western Wall (Wailing Wall)	68%	67.1%	Old Jaffa	50%	47.1%
The Jewish Quarter	63%	54.8%	Massada	25%	24.8%
Church of the Holy Sepulcher	54%	51.8%	Church of the Annunciation	28%	22.8%
Via Dolorosa	45%	44.9%	Namal Tel Aviv (Promenade)	24%	21.0%
Mount of Olives	46%	39.7%	Kfar Nahum (Capernaum)	26%	20.8%
Tower of David	26%	21.0%	Caesarea	23%	18.9%
City of David	33%	17.5%	Yardenit baptismal Site	19%	16.1%
Yad Vashem (Holocaust museum)	18%	14.5%	Baha'i Gardens	14%	11.4%
Israel Museum	15%	13.3%	Akko (Acre)	14%	10.9%
Al-Aksa Mosque	9%	5.9%	Tel Aviv Museum of Art	5%	2.9%
			Qasser el Yahud	4%	1.9%

- The tourists were asked to rate the sites they visited in two respects:
  - o The site from which they were most satisfied - in terms of experience.
  - o The most maintained site (cleaning, accessibility, etc.)

Most maintained		Most satisfied - experience	
Massada	28.8%	Al-Aksa Mosque	33.8%
Other site	24.6%	Massada	33.0%
Namal Tel Aviv	26.0%	Church of the Annunciation	28.6%
Yad Vashem	20.9%	Western Wall	26.1%

## 2.10. Factors impacting the decision to visit Israel

- Information sources:

14.1% of the tourists received information about Israel from a travel agent, 46.8% through the Internet, 6.2% from acquaintances in their home country, 12.6% from relatives/friends in Israel, 11.9% from community organizations and 2.6% from travel books and 5% had other sources of information.

- The most influential factor:  
52.9% of all tourists declared that their decision to visit Israel was followed by the recommendation of a friend or family member, 7.4% following a travel agent's recommendation, 11.4% following the recommendation of a professional organization, 4.2% were influenced by an advertising campaign, and 24.1% specify other.

#### **2.11. Average time of booking the trip:**

On average, tourists booked their reservations (for a flight ticket, hotel, car, etc.) 2.43 months before the trip. 45.7% of the tourists made their reservations up to one month before the trip. 33.7% made reservations 2-3 months in advance, 13.5% made reservations up to 6 months before the trip, and 7.2% made a reservation over 6 months prior to the trip.

#### **2.12. Intentions to visit Israel in the future**

Respondents expressed a high level of willingness to visit Israel in the very near future (an average of 4.3 on a scale of 1 to 5). 78.4% were certain or confident that they would return to Israel. 17.2% answered that they would consider returning to Israel, and 4.4% were certain or confident that they would not visit the country again.

#### **2.13. Means of payment**

42.6% Of tourists preferred to pay in cash during the trip in Israel , 23.1% in credit cards and 34.4% said they used other means of payment.

#### **2.14. Social Media**

Use of social media platform:

	During the trip in Israel		Before the trip in Israel	
	2016	2017	2016	2017
<b>Google</b>	61%	58.7%	81%	84.5%
<b>Facebook</b>	62%	54.7%	39%	23.8%
<b>Twitter</b>	4%	2.6%	3%	2.2%
<b>Instagram</b>	20%	21.5%	10%	8.8%
<b>TripAdvisor</b>	28%	20.5%	37%	26.8%
<b>Other</b>	7%	22.9%	11%	14.3%

Type of use in social media:

	During the trip in Israel		Before the trip in Israel	
	2016	2017	2016	2017
<b>Booking a flight</b>	4%	3.7%	62%	67.0%
<b>Booking accommodations</b>	6%	5.9%	43%	44.4%
<b>Booking an attraction</b>	5%	3.9%	10%	5.5%
<b>Finding a tour guide</b>	4%	4.4%	9%	7.2%
<b>Researching about the destination</b>	48%	37.0%	56%	41.1%
<b>Reading travelers' reviews</b>	33%	24.1%	43%	25.5%
<b>Sharing an experience (reviews, photographs etc)</b>	67%	67.6%	27%	15.2%

**2.15. Considering other destinations while planning the tour to Israel (a new question)**

1,094 tourists were considered other destinations than Israel.

Following their selected destinations:

<b>Jordan</b>	24.5%
<b>Spain</b>	8.4%
<b>Egypt</b>	8.2%
<b>Italy</b>	6.8%
<b>Greece</b>	5.4%
<b>Turkey</b>	4.8%
<b>Thailand</b>	3.8%

**2.16. Arrival to Israel via low-cost flights (a new question)**

29% of the sampled tourists arrived to Israel via low-cost flights.

<b>Easy Jet</b>	21.1%
<b>Wizz Air</b>	16%
<b>Other</b>	15%
<b>Ryanair</b>	14.8%
<b>Transavia</b>	11.1%
<b>UP (EL-AL)</b>	5.5%
<b>Pegasus Airlines</b>	4.7%

**2.17. Changed perception about Israel (a new question)**

The tourists were asked whether their opinion about Israel had changed following their visit to Israel.

<b>Changed for the worst</b>	<b>1.5%</b>
<b>Did not change my perception</b>	<b>41.1%</b>
<b>Changed for the better</b>	<b>57.4%</b>

### 3. Tourist expenditure

- Expenditure by method of trip organization (in USD)

	All tourists: Average expenditure		Tourists who stayed up 30 days Average expenditure	
	for tourist	for tourist per day	for tourist	for tourist per day
<b>Organized Tour</b>	1,792	239	1,777	243
<b>Tour Package</b>	1,614	164	1,488	184
<b>Independent - FIT</b>	1,238	124	1,126	135
<b>Total</b>	<b>1,421</b>	<b>153</b>	<b>1,339</b>	<b>167</b>

- Main expenditure components (in USD)

	2016		2017	
	Expenses (USD)	Percentage of total expenditure on components	Expenses (USD)	Percentage of total expenditure on components
<b>Accommodation</b>	662	44.4%	630	44.3%
<b>Transportation &amp; Touring</b>	252	16.9%	242	17%
<b>Shopping &amp; gifts</b>	178	12%	171	12%
<b>Miscellaneous*</b>	193	13%	165	11.6%
<b>Food and drinks</b>	205	13.7%	213	15%

\* Entertainment, medical expenses, conference fees, communications, etc

#### 4. Satisfaction with the visit to Israel

Tourists were asked to rate their satisfaction with the various aspects of their visit to Israel, on a scale of 1 to 5 (1 indicating a low level of satisfaction and 5 indicating a high level of satisfaction).

91.3% of the tourists rated their visit as generally “very good” or “excellent”. The average level of tourist satisfaction was 4.3.

*Note:* In order to shorten the response time, in the middle of 2017, all the satisfaction sub items were omitted from the questionnaire the data presented in this report is based on the responses received between January and June 2017.

Below are some noteworthy ratings, (highest and lowest):

<b>High satisfaction</b>		<b>Low satisfaction</b>	
<b>Tour guides</b>	4.5	<b>Quality of information in your language</b>	3.5
<b>Guided tours</b>	4.4	<b>Shops</b>	3.5
<b>Archeological and historic sites</b>	4.4	<b>Disabled accessibility to tourist sites</b>	3.4
<b>Personal safety</b>	4.2	<b>Cleanliness of public areas</b>	3.4
<b>Nature and environment</b>	4.1	<b>Cleanliness of toilets</b>	3.4
<b>Sea and beaches</b>	4.1	<b>Taxies</b>	3.3
		<b>Value for money</b>	3.1

## **B. Day Trippers**

195,486 day trippers visited Israel in 2017, compared to 94,999 in 2016.

### **1. Characteristics of the visitors**

#### **1.1 Country of origin**

The vast majority of tourists came from European countries (approx. 86%). Especially prominent among those were Russia and Ukraine.

#### **1.2 Family unit size**

23.1% traveled in a group of 3 people or more, 40.5% traveled in couples, and 36.4% traveled by themselves.

#### **1.3 Age**

18.6% of the tourists were 24 or younger, 41.2% were between 25-44 years of age, 20.5% between 45-54, and 19.7% were 55 or older.

#### **1.4 Religious affiliation**

- 85.5% were Christian, 5.2% were Muslim, 3% indicated no religious affiliation.
- Among Christians: 8.9% were Catholic, 88.4% were Orthodox, 0.8% was Protestant, 1.4% belonged to other denominations and 0.8% indicated no affiliation.

### **2. Characteristics of the visit**

#### **2.1 The main purpose of the visit**

The main purpose among these visitors was touring and sightseeing (82.9%), leisure and recreation (5.2%), and pilgrimage (3.4%) The remaining 4% indicated other purposes.

#### **2.2 First visit compared to return visit to Israel**

For most visitors, this was their first visit to Israel (87%), while 13% of visitors had visited Israel more than once.

### **2.3 Factors impacting the decision to visit Israel**

- The main source of information: travel agencies (83.1%), the Internet (8.7%), other sources (2.9%) and friends and relatives at home (2.2%).

### **2.4 Travel organization**

- 87.6% of these visitors came as part of an organized trip or as a part of a group; and 12.4% traveled independently (FIT).
- Most of the visitors (94.8%) made the reservations for the day trip less than 1 month in advance.

### **2.5 Main sites and places visited**

- Places: Jerusalem was visited by 95% of the visitors, the Dead Sea region was visited by 94.5%, Bethlehem was visited by 93.9%, Tel-Aviv Jaffa was visited by 15.5% and Eilat and the Red Sea by 13.2%.
- Sites: The Wailing Wall was visited by 90.3% of the visitors, Church of the holy sepulcher by 87.9%, other site by 11.8%, The Jewish Quarter by 9.7% and Mount of Olives by 9%.

### **2.6 Intentions to visit Israel in the near future**

When asked to rate their willingness to revisit Israel, the average was 4.0 on a scale of 1 to 5.

### **3. Expenditures of visitors in Israel.**

The average cost of a tour or package for a tourist who came to Israel as part of an organized trip was US \$130. These tourists spent an additional \$32 in Israel adding up to a total expenditure of US \$162 per tourist (for this category of tourist).

The average expenditure for a tour in Israel for all day-trippers was US \$169 per tourist.

### **4. Satisfaction with the visit in Israel**

#### **4.1 Overall satisfaction**

The satisfaction level average was 4.0 (on a scale of 1 to 5, 5 being highest). 92.7% described their overall satisfaction as “excellent” or “very good”.

Comparative data by points of departure, 2017

	<b>Total</b>	<b>Taba-Begin and Arava-Rabin Terminals</b>	<b>Allenby Bridge and Jordan Valley Border Crossing</b>	<b>Type 2 survey Ben-Gurion Airport</b>	<b>Ben-Gurion Airport</b>
<b>Tourist sample size (N)</b>	*22,000	1,054	1,582	9,680	17,324
<b>(Family group size (Number of tourists per questionnaire</b>	1.9	2.4	1.7	2.3	1.8
<b>Return visit</b>	44%	29%	7%	48%	51%
<b>Organized tour</b>	24%	21%	84%	26%	22%
<b>Package deal</b>	10%	6%	6%	13%	6%
<b>FIT</b>	66%	73%	10%	61%	72%
<b>Time of booking (in months)</b>	2.43	2.67	3.01	2.54	2.46
<b>Length of stay (in nights)</b>	10.2	7.4	5.9	8.9	11.2
<b>Intention to revisit Israel (on a scale of 1 to 5)</b>	4.3	4.2	3.6	4.1	4.4
<b>Average expenditure for tourist (USD)</b>	1,421	1,054	1,608	1,686	1,464
<b>Average expenditure for tourist per day (USD)</b>	153	140	292	175	147
<b>Satisfaction with visit to Israel (on a scale of 1 to 5)</b>	4.3	4.3	4.6	4.3	4.2

\* The above number includes the tourists sampled at Ovda Airport (N=2,040)

## Comparative data for Type 1 survey (Ben-Gurion Airport only) and Type 2 survey at Ben-Gurion Airport

		Type 1	Type 2
Unit Size גודל הקבוצה		1.8	2.3
Overall satisfaction שביעות רצון כללית		4.2	4.3
Travel Organization ארגון הנסיעה	Organized Tour טיול מאורגן	21.8%	25.7%
	Package Deal חבילת תיור	6.4%	13.5%
	FIT נוסע באופן עצמאי	71.9%	60.8%
Religion דת	Jewish יהודי	27.0%	28.5%
	Christian נוצרי	53.2%	53.7%
	Moslem מוסלמי	2.0%	0.6%
	Bahai בהאי	0.3%	--
	Bodhdhist בודהיסטי	0.8%	0.5%
	Hindo הינדים	0.6%	0.4%
	Other אחר	1.3%	4.5%
	No affiliation ללא השתייכות	14.9%	11.8%
Purpose of Visit מטרת הביקור	Leisure, Recreation בילוי והנאה	10.9%	21.0%
	Touring, sightseeing תיור וטיול	22.3%	25.2%
	Religious tour, Pilgrimage צליינות	18.1%	18.2%
	Visit friends relatives ביקור קרובים וידידים	30.6%	18.5%
	Convention Congress כנסים ותערוכות	1.0%	1.9%
	Business Government עסקים שליחות	11.6%	10.1%
	Health treatment טיפול רפואי	1.3%	1.0%
	Research Study מחקר לימודים	1.3%	1.4%
	Taglit תגלית	1.5%	1.1%
	Other אחר	1.4%	1.8%
Type of Accommodation סוג אכסון	Hotel, Holiday village בית מלון, כפר נופש	53.9%	56.6%
	Youth hostel אכסניית נוער	4.2%	4.7%
	Christian hospice אכסניה נוצרית	1.1%	2.2%
	Rented apartment דירה שכורה	9.5%	12.3%
	Friends relatives חברים קרובים	28.4%	20.9%
	Other אחר	2.9%	3.3%
Visit in Israel ביקור בישראל	First visit ביקור ראשון	49.4%	52.3%
	Return visit ביקור חוזר	50.6%	47.7%
Duration of Stay משך השהות	Number of nights מספר לילות	11.2	8.9
Time of booking מועד ההזמנה	Month mean ממוצע בחודשים	2.46	2.54
Expenditure הוצאות	Expenses without a flight הוצאות ללא טיסה	\$1,464	\$1,686
	Expenditure per day הוצאות ליום	\$147	\$175
Age גיל	0-24	14.9%	13.2%
	25-44	35.6%	40.1%
	45 +	49.5%	46.8%
Means of payment אמצעי תשלום	Credit card כרטיס אשראי	23.4	42.5%
	Cash מזומן	39.8	49.2%
	Other אחר	36.8	8.3%
Visit other countries ביקור בארצות נוספות	Visit other countries ביקור בארצות אחרות	4.5%	8.4%
Come with organized group דרך הגעה בקבוצה כלשהי	In a group הגיעו בקבוצה	21.6%	27.2%
	Mean Group size ממוצע גודל קבוצה	40	36
Information About Israel מקורות המידע אודות ישראל	Friends and relatives חברים וקרובים	19.8%	28.0%
	Other אחר	80.2%	72.0%

<b>Sites visited</b>	<b>Type 1</b>	<b>Type 2</b>
Western Wall	68%	60%
The Jewish Quarter	58%	45%
Church of The Holy Sepulcher	50%	44%
Via Dolorosa	42%	35%
Mount of Olives	39%	36%
Tower of David	23%	21%
City of David	19%	19%
Yad Vashem	17%	20%
Israel Museum	16%	19%
Al-Aqsa Mosque	5%	6%
Old Jaffa	50%	44%
Namal Tel Aviv (Promenade)	24%	15%
Church of the Annunciation	23%	22%
Capernaum	21%	26%
Caesarea	19%	28%
Yardenit, Baptismal Site	15%	18%
Bahai Gardens	13%	14%
Akko	11%	15%
Tel Aviv Museum of Art	4%	5%
Quasar El Yahud	5%	3%

<b>Activities</b>	<b>Type 1</b>	<b>Type 2</b>
Sea activities	43%	49%
Cultural events & festivals	8%	20%
Snapping, Bangee etc.	2%	3%
Daily guided tour	26%	25%
Desert tours	2%	6%
Sport activities	2%	6%
Bicycle trip	2%	3%
Folklore evening	1%	2%
Bird watching	1%	2%
Theaters	1%	2%

## **Comparative data for 2016 and 2017**

### **1. General**

In 2017, 3,614,143 persons visited Israel, compared to 2,872,581 in 2016.

### **2. Visitor characteristics**

#### **- Size of the family group**

In the present survey, high proportion of visitors arrived as part of a couple (35% compared to 31% in the 2016 survey), lower proportion of visitors arrived by themselves (47% compared to 57% in the 2016 survey). Overall size of the groups was 1.9 persons compared to 1.7 in 2016.

#### **- Tourists' religion**

The data are similar in both surveys.

#### **- Tourists' Age**

The data is similar in both surveys.

### **3. Characteristics of the visit**

#### **- Organization of the trip**

The data are similar in both surveys.

#### **- Duration of the stay**

The present survey presents a slightly lower duration of stay in Israel (10.2 nights compare to 11.4 nights in 2016).

Among the tourists staying up to 30 nights data is similar in both surveys.

#### **- Return visit compared to first visit**

The data is similar in both surveys.

#### **- Purposes of the visit**

The present survey presents a slightly higher number of tourists who have arrived for the purposes of leisure and recreation (17% compare to 10% in 2016) and have arrived for the purposes of touring and sightseeing (25% compare to 22% in 2016).

#### **- Visiting selected regions / cities**

The data is similar in both surveys with the exception of the higher percentage in Eilat & Red sea area (17% compare to 9% in 2016) due to the expansion of activity at Ovda airport.

#### **- Visit to sites**

The data is similar in both surveys.

#### 4. Tourist Expenses

	Average expense per tourist*		Average daily expense per tourist*	
	2016	2017	2016	2017
Organized trip	1,590	1,792	218	239
Tourist package	2,179	1,614	192	164
Independent FIT	1,337	1,238	124	124
<b>Total</b>	<b>1,492</b>	<b>1,421</b>	<b>154</b>	<b>153</b>

\* Figures displayed in US\$

The overall expenses of tourists are similar in both surveys. In 2017 there has been a decrease in the expenses of tourists arriving as part of a tourist package, and slightly higher expenditure of tourist arriving as part of an organized trip, compared to the previous (2016) survey.

Those arriving independently exhibit lower expenses compared to those arriving as part of an organized trip or a tourist package.

#### 5. Tourist Satisfaction

The overall rate of satisfaction with the trip to Israel is similar in present survey (average 4.3) compared to the previous survey. Satisfaction is similar in both surveys in most components making up the satisfaction category that have been checked.

## Comparative Data 2015-2017

		2015	2016	2017
Unit Size גודל הקבוצה		1.8	1.7	1.9
Travel Organization ארגון הנסיעה	Organized Tour טיול מאורגן	25%	32%	24%
	Package Deal חבילת תיור	8%	10%	10%
	FIT נוסע באופן עצמאי	67%	58%	66%
Religion דת	Jewish יהודי	27%	24%	22%
	Catholic קתולי	19%	19%	22%
	Orthodox אורתודוקס	14%	15%	15%
	Other Christian נוצרי אחר	4%	4%	4%
	Protestant-Evangelical churches אוונגליסט	10%	10%	10%
	Protestant-Other פרוטסטנטי אחר	4%	4%	3%
	No affiliation Christian נוצרי ללא השתייכות	2%	3%	2%
	Moslem מוסלמי	2%	4%	3%
	Bahai בהאי	0.3%	0.2%	0.2%
	Bodhdhist בודהיסטי	1%	1%	1%
	Hindo הינדים	1%	1%	1%
	Other אחר	2%	1%	1%
No affiliation ללא השתייכות		17%	14%	16%
Purpose of Visit מטרת הביקור	Leisure, Recreation בילוי והנאה	13%	10%	17%
	Touring, sightseeing תיור וטיול	19%	23%	25%
	Religious tour, Pilgrimage צליינות	22%	28%	19%
	Visit friends relatives ביקור קרובים וידידים	26%	24%	25%
	Convention Congress כנסים ותערוכות	1%	1%	1%
	Business Government עסקים שליחות	10%	8%	9%
	Health treatment טיפול רפואי	1%	1%	1%
	Research Study מחקר לימודים	2%	2%	1%
	Taglit תגלית	2%	2%	1%
	Other אחר	2%	2%	1%
Type of Accommodation סוג אכסון	Hotel, Holiday village בית מלון, כפר נופש	56%	61%	59%
	Youth hostel אכסניית נוער	5%	4%	5%
	Christian hospice אכסניה נוצרית	2%	1%	1%
	Rented apartment דירה שכורה	8%	6%	9%
	Friends relatives חברים קרובים	26%	23%	23%
	Other אחר	4%	3%	3%
Visit in Israel ביקור בישראל	First visit ביקור ראשון	51%	57%	56%
	Return visit ביקור חוזר	49%	43%	44%
Duration of Stay משך השהות	Number of nights מספר לילות	11.1	11.4	10.2
Expenditure הוצאות	Expenses without a flight הוצאות ללא טיסה	\$1,556	1,492\$	1,421\$
	Expenditure per day הוצאות ליום	\$158	154\$	153\$

## **DEFINITIONS AND EXPLANATION**

### **Survey Type**

- Type 1 survey: a survey in which the surveyor interviews the tourist face to face, using a tablet with a dedicated application. The survey was conducted at the border crossings: Ben-Gurion Airport, Ovda Airport, Allenby Border Crossing, Jordan Border Crossing, and the Arava Rabin border.
- Type 2 survey: a survey in which the tourist receives a tablet containing a specific application to complete the questionnaire independently. In this survey, the surveyor distributes several tablets to various tourists at the same time and at the same area and provides technical assistance if necessary. Once they finish completing it, the surveyor collects the tables. The surveyor assists in completing the questionnaire but cannot monitor the answers.

### **Tourists**

- Survey Population: The survey population includes all tourists who left Israel during 2017 between January and December.
- Tourists by air: tourists who came with commercial air travel (excluding private airplanes, military flights, air transport, etc.) from Ben-Gurion and Ovda Airports.
- Tourists by land: Tourists who came and left via the Taba-Begin, Jordan River, Allenby Bridge and Arava-Rabin border crossings.
- Tourist: A foreign inhabitant who came to Israel or left it by air, land, or sea in the time of the survey. Tourists include Israeli citizens who have been abroad for more than one year, not including flight crews. The survey did not include foreign residents who were in Israel for over a year or foreign workers.
- Family Group – Family Unit: A group of one or more people who left or entered Israel together, and who had joint expenditures in Israel. For example: husband and wife, father and son. Grandfather and grandson, brother and sister, etc.
- Head of the Family Group: The person who was head of the family group during the trip (not necessarily the head of the family, who may not have traveled with the group).

- Accompanying travelers: Members of the family group, other than the head of the group. Accompanying travelers were questioned regarding their gender and age. All other questions were directed to the head of the family group, unless otherwise noted in the definition.
- Country of Residence: The country in which the tourist usually resides, and his/her region/city of residence.

### **Purposes of the visit to Israel**

The purpose of the visit to Israel, mentioned by the head of the group, was applied to all accompanying family members.

Hereinafter is the variety of reasons for visiting Israel:

- Leisure and recreation: includes vacations at seaside resorts, etc.
- Sightseeing and touring: traveling in Israel to various tourist sites.
- Pilgrimage and Holy Land Tours: including Jews and others who came for purposes of visiting the Holy Land.
- Visiting Friends and Relatives: including visiting friends and family events.
- Conventions and exhibitions: participation in various congresses and exhibitions.
- Business and missions: include official missions, diplomats and UN delegates.
- Health and spa: came to Israel for treatment and spa purposes.
- Medical treatment: tourists who came to Israel for medical tests or to receive medical treatments.
- Studies and Research: tourists who came to Israel for purposes of studying, research, and continuing education programs at higher education institutes, boarding schools and yeshivas.
- Taglit: (Discovery) people who came here through "Taglit program".
- Bird watching: Tourists who came to Israel for watching birds and follow their lifestyle.
- Hiking: Tourists who came to Israel for hiking around the country.
- Other: including checking opportunities for settling down in Israel, accompanying a family member, and other purposes.

## **Stay in Israel**

- Average length of stay in Israel: the average number of nights all tourists spend in Israel does not include tourists who did not report the number of nights spent in Israel. Tourists who stayed more than a year were excluded from the survey.
- Stay in selected areas: For each location, the tourists who noted that they had stayed there at least one night were counted. On basis of these data, the average stay in a location was calculated.

## **Main Type of Accommodation**

The main type of accommodation in which the tourist spent the greatest number of nights during the visit to Israel, as reported by the tourist. Hereinafter are the types of accommodation:

- Hotels: include both those recommended and those not recommended to tourists, as well as Kibbutz guest houses and resort villages.
- Youth Hostels: hostels belonging to the "Youth Hostels Association".
- Christian Hospices: hospices belonging to the Christian Church, in which tourists (mostly pilgrims or young people) stay.
- Rooms in Rural Areas: Kibbutzim and moshavim that are not registered as guesthouses.
- Rented Apartment: an apartment rented by the tourist for the stay in Israel including the use of rental sites such as AirBNB.
- Home and Relatives or Friends: residence without pay, at the home of relatives or friends.
- Secondary residence: an apartment or a home owned or rented by the tourists, used on a regular basis.
- Other: residence at military camping, university campus, yeshivas, etc.

## **Expenditures**

- Travel package – inclusive Tours: A visit to Israel organized and paid for in advance, including airfare and some land services, primarily accommodation (with or without board), transfers between airport and hotel, car rental, guided tours in Israel, etc. Several package deals include visits to countries in addition to Israel.
- Expenditures on travel package: total expenditure paid by the tourist abroad for the package, excluding the airfare cost. A tourist who traveled with a travel package reported the total amount of expenditures paid abroad for the travel package, and sometimes also for the airfare cost. When the airfare cost was included, it was reduced from the price of the whole package, and the rest was taken for "ground services" in Israel paid abroad (this price includes commissions and different expenses that do not come to Israel). If the tourist did not report the airfare price in the package, an average airfare cost was reduced.
- Lands services paid abroad: Airfare and land services purchased by the tourist abroad that were not organized as part of an organized trip, such as: accommodation, rented car and guided services.

### **Average expenditure per tourist according to components:**

- Average expenditures per tourist for all tourists: including tourists who did not use the different tourism services, for whom the expenditure was calculated as zero (0).
- Expenditures in Israel: The tourist was asked about the total amount of expenses spent in Israel (including accompanying expenses) for services and shopping, excluding investments and business expenses. The tourists' report was in different currencies that were translated to U.S. dollar, according to the average foreign exchange rate between the dollar and the reported currency. The tourists' expenditures include all fees paid in Israel and abroad, less the agent's commission and excluding the airfare cost.

- Accommodation: expenditures for all types of accommodation and for purchasing other services, such as: laundry, swimming pool, nightclub, restaurants, etc.
- Meals: restaurants and cafes, and other daily expenditures on food, drinks and tobacco outside the hotel.
- Transportation and guided tours in Israel: Expenditures for traveling with private or public transportation, internal flights, expenses for car rental, etc. In addition, tours organized by travel companies or travel agencies for tourists, whether in large groups (on buses) or in small groups (in cars).
- Car rental: including all types of expenses for a rented car (insurance, gasoline, etc).
- Various shopping: gifts, books and other purchases, including purchases in tax-free shops in Israel.
- Registration fees for conventions and exhibitions: including registration fees for conventions and exhibitions and payments related to a convention or collected by the convention organizer.
- Health expenses: all types of health expenses of tourists who came for the purpose of medical treatments and those who came for other purposes.
- Gifts for Israel's residents: gifts for Israel's residents, both as cash and as a present.
- Other expenses in Israel: these expenses were not classified in one of the above-mentioned categories.

The following expenditures are not included in the calculation of tourists' expenditures:

- Purchases for investment (apartment, plot of land, etc.)
- Bank deposits
- Purchases in commercial amounts for export purposes (diamonds, etc.)

### **Tourist's opinion about visiting Israel**

- The tourists were asked to rank the quality of tourism services in Israel, on a value scale of 1 to 5, with 1 indicating "not good" and 5 indicating "excellent".

The grade was given for different components as follow:

- Overall satisfaction
- Cleanliness of public areas
- Personal safety
- People's friendliness
- Accommodation facilities
- Restaurants
- Entertainment and nightlife
- Quality of information in the tourist's language
- Natural surrounding
- Beaches and sea
- Archeological and historical sites
- Taxis
- Shops
- Tour guides
- Guided tours
- Health services
- Airport/Terminal facilities
- Passport control
- Baggage security check
- Overall Value for money
- Public transportation
- Public toilet
- Car rental
- Tourists information office
- Accessibility of tourist sites to handicapped/disabled

As of January 2018, questions regarding satisfaction were omitted from the questionnaire in order to shorten the response time and due to minor variation in the grades throughout the years.

### **Trip Organization:**

The tourists were classified into 3 groups according to trip organization:

- Tourists travelling on an organized tour: Mainly includes groups traveling together, but also individuals. This group includes tourists who purchased in one package most of the land services for the trip: flight ticket, accommodation, transportation, site entrance, etc.
- Tourists who purchased packaged deals: Package deals usually include flight tickets, accommodation and transfers. Purchased mainly by individuals or couples. The typical tourists for this group are tourists who came for the purpose of vacation and leisure.
- Frequent individual tourists (FITs): This group includes the tourists who pay for all land services in Israel during their visit. This category includes VFR businessmen, students, etc.

### **Missing answers and unknown data**

- In some questionnaires, answers to several questions were missing either as a result of lack of understanding or disqualification of the answer. Therefore, the number of observations varies in each table and represents the total number of answers received for that question. Percentages listed in the tables were calculated based on the actual answers.

# Chapter 1

## Methodology

## **Methodology**

### **1.1. Background**

The Israel Tourism Survey was conducted in 2017 under the initiative and with the funding of Ministry of Tourism. The survey is a follow up of tourism surveys conducted in Israel since 1993.

As of this year (2017), the survey was conducted using two similar questionnaires, which are similar in most of the questions. They are attached in the "Sample Questionnaires in English" appendix, where questionnaire of type 1 is conducted by a face to face surveyor, and questionnaire of type 2 is conducted by answering the questionnaire using a tablet.

### **1.2. Objectives of the Survey**

Primary objectives of the survey were:

- To characterize tourists according to demographic characteristics.
- To gather data about the characteristics of the visit, such as: purpose of visit, duration of the visit, and type of accommodation used while in Israel.
- To get tourists' opinions on Israeli tourism services.
- To provide up-to-date data regarding the expenditures of tourists visiting Israel.
- To identify changes compared to previous surveys.

### **1.3. Survey Population**

The survey population is comprised of tourists who have visited Israel during 2017 between January and December.

Tourists were interviewed upon their departure, whether by air or by land. The population consists of 3.614 million tourists who stayed overnight in Israel.

The above population does not include:

1. Tourists who arrived via the Haifa or Sde Dov airport.
2. Tourists who arrived from 'undefined countries' (Israel, United Nations, and the Palestinian Authority).
3. New immigrants (Olim).
4. Diplomats who are permanently based in Israel
5. Foreign workers

6. Tourists who have resided in Israel for more than 1 year.

Israeli citizens who permanently reside in other countries were included, as their visits to Israel granted them visitor status.

The survey population did not include several kinds of tourists who have visited Israel, therefore the survey reports about the number of tourists is lower relatively than reported by Central Bureau of Statistics.

The survey was conducted in the Ben-Gurion and Ovda airports, the River Jordan crossings, Allenby Bridge, Taba-Begin Terminal, and Arava-Rabin Terminal.

Additionally, the survey population included 195.5 thousand day trippers.

The following table presents all tourists who have left any Israeli border crossing during 2017, divided according to ‘day-trippers’ (tourists who remained in Israel less than 1 day without staying overnight) and ‘tourists’ (visitors who remained in Israel for more than 1 day).

The following tables are based on data received from the Central Bureau of Statistics.

**Table 1.1: Numbers of tourists according to departure stations (thousands)**

Departure stations	Tourists		Same day visitors	
	Total number of departing tourists	Percentage of departing tourists	Total number of departing tourists	Percentage of departing tourists
<b>Ben Gurion Airport</b>	3,155.4	87.3%	106.7	54.6%
<b>Eilat air</b>	78.7	2.2%	7.7	3.9%
<b>Taba and Arava Terminals</b>	147.8	4.1%	75.5	38.6%
<b>Allenby Bridge and Jordan Valley Border Crossings</b>	232.3	6.4%	5.6	2.9%
<b>Total</b>	<b>3,614.1</b>	<b>100%</b>	<b>195.5</b>	<b>100%</b>

Here are the same data divided according to the months of the year:

**Table 1.2: Number of tourists by month (thousands)**

	Tourists		Day trippers	
	Tourists	Percentage in population	Tourists	Percentage in population
<b>January</b>	252.1	7.0%	11.8	6.1%
<b>February</b>	225.6	6.2%	9.5	4.9%
<b>March</b>	298.0	8.2%	9.7	5.0%
<b>April</b>	319.8	8.8%	10.3	5.3%
<b>May</b>	350.9	9.7%	17.4	8.9%
<b>June</b>	301.8	8.4%	18.7	9.5%
<b>July</b>	279.5	7.7%	21.6	11.0%
<b>August</b>	282.7	7.8%	21.2	10.8%
<b>September</b>	260.0	7.2%	20.9	10.7%
<b>October</b>	378.5	10.5%	20.8	10.7%
<b>November</b>	409.5	11.3%	18.0	9.2%
<b>December</b>	255.8	7.1%	15.6	8.0%
<b>Yearly total</b>	3,614.1	100%	195.5	100%

#### **1.4. Sample size**

According to the Ministry of Tourism guidelines, the size of the sample for type 1 required is 15,000 questionnaires, which include one-day tourists and tourists who have been at least one day in Israel. The required size of the sample for type 2 is 6,000 questionnaires.

The questionnaires represent visitors as follow:

- 15,214 questionnaires of tourists who have spent at least one day in Israel of type 1 represent 22,000 tourists.
- 5,935 questionnaires of tourists who have been at least one day in Israel of type 2 (Chapter 4 in the report) represent 9,680 tourists.
- 771 questionnaires of one-day visitors (of which 75 questionnaires of tourists using a survey method of type 2) represent 1,223 tourists.

**Note:** during the course of 2017, the activity at Ovda Airport was expanded, so the overall number of type 1 questionnaires sums up into 15,910.

#### **1.5. Sampling Method**

The sampling plan is based on a weighted average of tourist departures in the last 3 years from January to December, as follows:

The total tourist population of 2015 constitutes 20%.

The total tourist population of 2016 constitutes 30%.

The total tourist population of 2017 constitutes 50%.

Sample allocation was conducted according to statistical considerations that slightly deviate from considerations of pure proportional representation. In the current application, a 'stratum' is determined by month, point of departure, type of visit (1 day or more), and continent. A statistical principle dictates that strata with a greater level of uncertainty are to be surveyed more, and not necessarily in proportion to the size of the stratum. In particular, strata with a high number of items do not require a proportionately large sample – a maximum number of items from that stratum may be determined instead.

The following steps were taken:

1. Exclusion of airports: Haifa and Sde Dov – due to a small number of visitors.

2. Exclusion of the following countries of origin: Israel, United Nations, undefined country, and states without continental affiliation.
3. The first phase of the sample allocation:
  - a. A cell defined by month, station, continent and type of visit (one day or longer).
  - b. The sample allocation for each cell is proportional to the number of tourists, yet with the following constraints:
    - i. A maximum of 500 in a sample for the same cell (month, station, continent, type of visit).
    - ii. A minimum of 2 in the sample for each cell.
4. In the second phase, the allocation per continent was divided between countries of the same continent:
  - a. Done according to the proportion of tourists from that country (in the same month, the same point of departure, and the same type of visit).
  - b. Figures were rounded.
5. Result – each month and each point of departure have a table containing the number of tourists in the sample from each country and for each type of visit.
6. The following table presents the number of questionnaires and the number of tourists they represent for each point of departure, compared to the total population departing from those points of departure.

**Table 1.3: Number of tourists in the survey and the population according to departure stations**

Depart. stations	Tourists					Same day visitors				
	Sample			Population		Sample			Population	
	No. of questionnaires	No. of tourists*	Sample Percentage	Total Outgoing Tourists	Population percentage	No. of questionnaires	No. of tourists*	Sample Percentage	Total Outgoing Tourists	Population percentage
<b>Ben Gurion</b>	12,602	17,324	78.7%	3,155,357	87.3%	759	1,197	97.9%	106,681	54.6%
<b>Eilat air**</b>	896	2,040	9.3%	78,738	2.2%	6	14	1.1%	7,676	3.9%
<b>Taba &amp; Arava Terminals</b>	583	1,054	4.8%	147,779	4.1%	6	12	1.0%	75,524	38.6%
<b>Allenby Bridge &amp; Jordan River</b>	1,133	1,582	7.2%	232,269	6.4%	-	-	0%	5,605	2.9%
<b>Total</b>	15,214	22,000	100%	3,614,143	100%	771	1,223	100%	195,486	100%

\* Number of tourists represented in the questionnaires. In some cases a questionnaire represents more than one person.

\*\* Since the beginning of the winter season in 2017, the Ministry of Tourism is conducting a survey at Ovda Airport, as a result of which data will be presented in a dedicated report to Ovda Airport.

7. The following table shows the number of tourists by months:

**Table 1.4: Number of tourists in the sample and the population by month**

	Tourists				Day trippers			
	Sample		Population		Sample		Population	
	Tourists	Percentage in sample	Tourists	Percentage population	Tourists	Percentage in sample	Tourists	Percentage population
<b>January</b>	2,630	12.0%	252,058	7.0%	10	0.8%	11,843	6.1%
<b>February</b>	2,395	10.9%	225,621	6.2%	11	0.9%	9,516	4.9%
<b>March</b>	1,411	6.4%	297,992	8.2%	17	1.4%	9,689	5.0%
<b>April</b>	899	4.1%	319,820	8.8%	21	1.7%	10,305	5.3%
<b>May</b>	1,256	5.7%	350,952	9.7%	304	24.9%	17,402	8.9%
<b>June</b>	1,720	7.8%	301,810	8.4%	298	24.4%	18,659	9.5%
<b>July</b>	1,462	6.6%	279,483	7.7%	223	18.2%	21,557	11.0%
<b>August</b>	2,025	9.2%	282,650	7.8%	175	14.3%	21,173	10.8%
<b>September</b>	1,224	5.6%	260,026	7.2%	28	2.3%	20,955	10.7%
<b>October</b>	2,062	9.4%	378,473	10.5%	89	7.3%	20,838	10.7%
<b>November</b>	2,472	11.2%	409,476	11.3%	28	2.3%	17,982	9.2%
<b>December</b>	2,444	11.1%	255,782	7.1%	19	1.6%	15,567	8.0%
<b>Total</b>	22,000	100%	3,614,143	100%	1,223	100%	195,486	100%

8. The tables indicate that there are certain gaps between the percentage of tourists in the various departure points and different months in the sample, and between the corresponding percentage in the entire tourist population. Sample weighting will resolve these gaps (see below).
9. During 2017, visitors arriving on cruise ships were not sampled due to lack of cooperation of the cruise companies.
10. Sample control was conducted continuously throughout the survey. Computerized control was carried out on a daily and weekly basis – during the work corrective actions were performed, which included adding sampling times and emphasizing populations that were not adequately represented in accordance with the defined sampling plan.
11. The following table presents data on the size of the sampling error in different sample sizes, when referring to the percentage calculation.

Calculation explanation:

The average of the calculation is 0.963

The total population is 3.614 million

The sample size is 22,000

According to a cumulative normal distribution table:  $Z = 1.96 / 2 = 0.98$

The confidence interval formula for the range of the sampling error at a

confidence level of 95%:  $[Z/\sqrt{n}] * WEIGHT$

**Table 1.6: Range of sample error for different sample sizes**

Number of responders	Sampling error range*
Up to 30	19%±
31-40	19%±-16%
41-50	16%±-14%
51-100	14%±-10%
101-200	10%±-7%
201-300	7%±-6%
301-400	6%±-5%
401-500	5%±-4%
501-800	4.5%±-3.5%
801-1500	3.5%±-2.6%
1501-4000	2.5%±-1.6%
4001-6000	1.6%±-1.3%
6001 & up	Less than 1.3%

\* Level of confidence - 95%

## **1.6. The Questionnaires**

1. Questionnaires were composed and conducted in 8 languages: English, French, German, Italian, Spanish, Russian, Polish and Chinese. The questionnaires in English are included in the appendix.
2. Questionnaires were filled in using a handheld computer (Tablet) as part of a face-to-face interview, while providing the tourist with an explanation (if needed). In certain instances, the questionnaire was not filled in on a tablet. This usually took place in land-crossing terminals, in which transit was relatively rapid, and the use of a tablet would result in the loss of observations (tourists)
3. When the questionnaire was aimed at a family group travelling together, it was filled in by one of its members while other family members were allowed to assist.
4. In cases where respondents gave answers that were **not** included in options provided by the questionnaire, they were categorized as 'other'.
5. The process of filling in the questionnaire usually took 6-14 minutes.

6. During the interview, logical tests were conducted using the tablet software, to ensure the quality of the response process. Logical tests were also conducted during the data analysis stage.

### **1.7. The Data gathering process**

Data gathering was conducted as the visit to Israel was concluded, in the tourists' point of departure. The survey was conducted in the departure hall, after the passport check, when tourists had ample time to participate in the interview. In cases where tourists refused to participate, they were recorded as refusals, and were taken into account when calculating the willingness to respond percentage. The refusal rate is about 20%.

The unit of inquiry was an individual passenger (even if he or she was part of a group) as well as a family group travelling on a joint budget (family unit).

The survey team included foreign language speakers, who explained the purpose of the survey to the tourists in order to receive their cooperation.

In Ben-Gurion Airport, the survey took place daily, barring weekends and holidays. The survey was conducted throughout all hours of the day (late night flights, Fridays before the Sabbath, and evenings following Saturdays and holidays). For the purposes of the survey, an average of 4 surveyors were present.

In other points of departure, several days were sampled for each month so as to adequately represent active days, hours, and the required extent of the survey.

## **1.8. Data weighting method**

This research employed the choice-based sampling method (which is a type of stratified sample). In this sampling method, the representation of different results is dependent on the choice that was made, meaning that the results of the sample may appear more or less frequently than they do in the population.

The sampling plan is based on a weighted average number of tourist entries for the last three years from January to December, as follows:

The total tourist population of 2015 constitutes 20%.

The total tourist population of 2016 constitutes 30%.

The total tourist population of 2017 constitutes 50%.

A sample conducted using this method is therefore biased, and must be weighted before going on to perform the primary statistical analyses. For tourists and day-trippers, weighting in this research will be conducted according to the following strata:

- **Country of origin**

This variable was compiled into 41 countries that displayed in the report: France, Germany, Russia, United Kingdom (including Scotland), United States, Argentina, Australia, Austria, Belarus, Belgium, Brazil, Czech Republic, Canada, China, Denmark, Estonia, Finland, Greece, Hungary, India, Indonesia, Ireland, Italy, Japan, Latvia, Lithuania, Mexico, Netherlands, Norway, Philippines, Poland, Romania, Singapore, Slovakia, South Africa, South Korea, Spain, Switzerland, Sweden, Turkey and Ukraine.

- **Continent of origin**

This variable was compiled into 7 categories: Asia, Africa, Europe, Oceania, North America, Central America and South America.

- **Month**

This study examined 12 months: from January to December.

- **Point entry to Israel**

This variable was grouped into 4 categories: Ben-Gurion Airport, Ovda airports, Allenby Bridge and River Jordan border crossings, and Arava-Rabin and Taba-Begin terminals.

This division creates [7 (or) 41 x12x4] different sub-groups.

The weighting was done following the method of C. F. Manski and S. R. Lerman<sup>1</sup>, where each observation is weighted by:

$$\frac{\text{Percentage of population from subgroup A}}{\text{Percentage of visitors from subgroup A in the sample}}$$

In this research, questionnaires referred to more than 1 person, and therefore the percentage of visitors in a certain sub-group of the sample was not calculated by the number of questionnaires in that sub-group, but rather by the number of visitors included in these questionnaires.

One of the objectives of this survey is to estimate the number of visitors possessing certain features in the population based on the number of visitors obtained in the sample, for example, to estimate the number of visitors in the population of high-income earners, the number of visitors in the population with children, etc. In order to calculate the anticipated number of visitors in the population, the numbers obtained in the sample should be weighted, with the weighting taking into account the fact that the population was divided into subgroups (by month, country of origin and points of entry into Israel). This observation was weighted as follows:

$$\frac{\text{The number of visitors from subgroup A in the population}}{\text{The number of visitors from subgroup A in in the sample}}$$

For each of the [7 (or) 41 x12x4] subgroups.

For **single-day tourists**, the same weight was applied when the difference was in the country of origin: Kazakhstan, Russia, USA, Belarus and Ukraine. This division creates [7 (or) 5 x12x4] different subsets.

---

<sup>1</sup> Charles F. Manski and Steven R. Lerman. The Estimation of Choice Probabilities from Choice Based Samples. *Econometrica*, Vol. 45, No. 8 (Nov. 1977), pp. 1977-1988.

In the wake of the fact that in this method there is a large number of sub-groups A - which can bias the findings of the answers in the tables, it was decided to divide the results of the calculation as follows:

- If the country is included among the countries that have to be presented in the report (41 countries) then subgroup A will be calculated as [state X terminal X month].
- If the country is not included among the countries that have to be presented in the report the sub-group A will be calculated as [continent X terminal X month].
- If sub-group A in the sample is associated with one of the 41 countries presented in the report and fewer than 10 tourists were sampled in that specific sub category, we subtract one rank in the data weight. For example, if 7 tourists from Germany were sampled during the month of December, The same 7 tourists will be calculated as [continent (Europe) X terminal X month].
- If the result of the calculation by continent or country is less than 0.4 or greater than 2.5, weight was not adjusted (meaning that the weight=1) in order to avoid overrepresentation or under-representation for questionnaires that extremely under represent or extremely over represent tourists in relation to the actual tourist population.

## **1.9. Method for calculating tourists' expenditures in Israel**

1. The survey is interested in two main groups (which are differentiated according to question 3 in the long questionnaire):
  - Tourists who have spent at least 1 night in Israel ('tourists')
  - Visitors who have not stayed in Israel overnight ('day-trippers')
2. Each group is divided into 3 sub-groups according to the manner of their tour organization (question 14).
  - Organized tour
  - Tour package
  - Independently (FIT).
3. For each group, the price of the entire package, organized tour or the visit in Israel (question 17), is given. A certain part of this amount remains in Israel, and the aim of the calculation is to determine, for each type of group, what is its size and into which categories of expenditure it should be divided.
4. For **all types of tourists**, the entire sum:
  - Was converted to US dollars, according to the standard average rate for that quarter.
  - A 15% commission was deducted.
  - The cost of the flight was deducted, calculated according to median airfares according to tourists' report of those countries.
  - We issued exceptional reports for each item of expense if the difference exceeded 2.5 standard deviations.
  - Tourists staying over 90 days in Israel were not included in the averages calculations and their reports remained as reported in order avoid biased average.
  - We calculated the median amounts of all categories of expenditure. This calculation was conditional on a minimum number of those who reported, as long as it exceeded 20. This calculation was performed for the purpose of transplanting missing data into various expenditure categories.

5. If the tourist (not relevant to day-trippers) visited another country (question 19), we deducted an amount from the remaining sum, calculated according to the ratio between the nights spent in the other country and the total of the nights spent in Israel and the other country. Based on the assumption that prices in the neighboring countries are cheaper than Israel, we divided the total expenditure in additional countries as follows: 35% of the total expenditure in the additional country is accredited to expenditure in Israel.
6. If a tourist reports that the tour package (or the organized tour) included a trip to a foreign country but no amount was specified in the foreign country, we assumed 61% of the total expenditure as expenses in Israel and the rest as expenses in the foreign country. This figure is based on a calculation throughout several years of surveys.
7. For tourists arriving as part of an organized tour, the remainder (after performing clauses 4,5 and 6) was divided as follows:
  - 65% Hotels
  - 15% Entrance fees into tourist sites
  - 15% Transportation, guides, and tours
  - 5% Commission in Israel

The above-mentioned amounts were added to the corresponding clauses detailing expenses in Israel.

For tourists arriving as part of "Taglit" program, the cost of the package was calculated as \$3,000, of which \$1,300 was expenditure in Israel, which was divided as follows:

- 32% Hotels
- 9% Entrance fees into tourist sites
- 16% Transportation, guides, and tours
- 43% Commission in Israel

8. For tourists arriving as part of a tour package:

If a tourist reported that the tour package included organized tours or entry fees to sites, we consider the tour package as an organized tour and the expenditure distribution at his home country divided into different variables as distributed in clause 7. Otherwise, after performing clauses 4,5 and 6, we divided the remainder according to the level of hotel in which the tourist stayed. If the answer to question 9 was 1 (high-end):

90% Hotels

10% Transportation

If the answer to question 9 was not 1:

85% Hotels

15% Transportation

9. Tourists arriving independently (FITs):

The remainder (after performing clauses 4,5 and 6) was divided according to the answers given to question 8. If the answer to question 8 was 6 (staying with friends / relatives), we divided the remainder as follows:

20% Hotels

80% Transportation

For other answers to question 8, we followed the same guidelines as in paragraph 8 (i.e. according to type of accommodation).

10. Day-tripper, irrespective of means of arrival:

We deducted an 8% commission (not including day-trippers arriving independently). We deducted airfare (using a discount rate for charter flights) only for tourists arriving through Ben-Gurion Airport, or tourists who indicated that airfare was included in the price of the package.

11. For all of the groups:

- In instances where data were missing, we attempted to supplement it using the answers we received. For example, if a tourist answered the question relating to the components of his or her expenditure in Israel but did not provide the total expenditure in Israel, we added all of the components to arrive at the desired total.
- Extraordinary values (above 2.5 standard deviations) were removed from the data pertaining to average expenditure per tourist in Israel and the average daily expenditure per tourist in Israel.
- The expenditure categories were adjusted for the number of nights stayed in Israel as follows:
  - Medical expenses: It is assumed that this expense is one-time expense and was not divided by days stayed in Israel.
  - Conferences: It is assumed that this expense is one-time (overall) expense and therefore it cannot be considered a daily expense and was not divided by days stayed in Israel.

- Communication: It is assumed that a tourist purchased a single SIM card, so this expense is a one-time (overall) expense and therefore it cannot be considered a daily expense and was not divided by days stayed in Israel.
- Food: This variable was divided by days stayed in Israel.
- Shopping: It is assumed that this expense is one-time and was not divided by days stayed in Israel.
- Entertainment: This variable is divided by days stayed in Israel.
- If a tourist reported that the main purpose of the trip is for medical treatment and did not report the amount in its category of expense, then we implanted the median value based on those who did report this category.
- If a tourist reported that the main purpose of the trip is conferences/exhibitions and was not aware of the price of the conference or exhibition. In most cases, these are businessmen whose employer paid for the conference exhibition. Therefore, although out of 121 questionnaires, only 14 questionnaires reported the related category of expense, a relatively low number for the median calculation, we did calculate the median price for this category (\$550) after examining this median versus previous years, was found that the median was very similar to the median of previous years, then the median value of those questionnaires was implanted.

### **1.10. Comment to tables report**

In the report cells with  $N < 30$  are not displayed in the tables.

The tables presented weighted data.

The number of tourists (N) in tables based on un-weighted data. The first table in each paragraph presents the number of tourists based both on weighted and un-weighted data.

# **APPENDIX**

## **Survey**

### **Questionnaires**

שאלונים

Type1

Dear Passenger,

The Israel Ministry of Tourism is conducting a survey among a sample of passengers departing from Israel; the survey is designed to provide basic data on tourism to Israel, in order to assist us in improving tourism services.

We appreciate your cooperation. Please take a few moments to answer this questionnaire.

**THIS QUESTIONNAIRE REFERS TO ALL FAMILY MEMBERS/FRIENDS TRAVELLING TOGETHER WITH SHARED EXPENSES, OR A PERSON TRAVELING ALONE.**

1) What is your permanent country of residence?

1. Country \_\_\_\_\_
2. City/ State/ Region \_\_\_\_\_
3. Nationality \_\_\_\_\_
4. Zip code \_\_\_\_\_

2) Did you fly to Israel with a low-cost air carrier? \_\_\_\_\_

1. Yes, please indicate the company name \_\_\_\_\_
2. No

3) How many nights did you spend in Israel? \_\_\_\_\_ Nights.

4) Please indicate the number of persons, including yourself, and children, covered by this questionnaire. \_\_\_\_\_ Persons.

3a). How many of them are under the age of 15?  
\_\_\_\_\_ Children.

5) Did you come to Israel with group organized by any organization?

1. Yes. Please specify:
  - A. Christian Church
  - B. Jewish Organization
  - C. Human /Social organization
  - D. Other
2. No

**Question no. 6 is only for those who answered "yes" in the previous question:**

6) Please indicate the number of persons in your group  
\_\_\_\_\_ Persons.

7) What was the main purpose of your visit to Israel?

(Choose **only one** answer)

1. Leisure, Recreation and Holidays
2. Touring, sightseeing the country
3. Religious tour, Pilgrimage, Holy Land tour
4. Visit friends and relatives
5. Convention, Congress, Exhibition
6. Business, Professional, Government, Official mission
7. Wellness, SPA
8. Medical treatment
9. Research, Study
10. Taglit
11. Bird watching
12. Hiking
13. Other

8) Is this your first visit, or a return visit to Israel?

1. First visit
2. Return visit

**If it's not your first visit:**

8a) When was your last visit in Israel?

(Please indicate year): \_\_\_\_\_

9) What was the principal type of accommodation you used in Israel?

(Choose **only one**)

1. Hotel, Kibbutz hotel, Holiday village
2. Youth hostel
3. Christian hospice
4. B&B in a rural area
5. Vacation Rentals (e.g. Airbnb, Couchsurfing)
6. Friends, relatives
7. Holiday, dwellings/Time sharing
8. Secondary residence
9. Other

**Question no. 10 is only for those who marked 1 in the previous question:**

10) What was the grade of your accommodation?

1. High level (5 stars hotel)
2. Medium level (3-4 stars hotel)
3. Low level (1-2 stars hotel)
4. Other, Not classified

11) When you considered traveling to Israel did you consider any other alternative destinations?

1. Yes
2. No

**Question no. 12 is only for those who marked 1 in the previous question**

12) Which other destinations: \_\_\_\_\_

13) What was the **main** source of information for your visit in Israel? (Choose **only one**)

1. Internet, Electronic Database information
2. Travel agency / Tour operator /Airline
3. Friends and relatives in Israel
4. Friends and relatives at home
5. Guide books
6. Advertising and publications
7. Israel government tourist information offices abroad
8. Media (T.V, newspapers, magazines, etc.)
9. Tourism fairs, exhibitions.
10. Community church, organization
11. Other

14) Which of the following reasons most influenced your decision to visit Israel? (Choose **only one**)

1. Recommendation of friends / family
2. Recommendation of a travel agent
3. Viewing of an advertising campaign
4. Recommendation of my corporation/ professional organization
5. Other: \_\_\_\_\_

15) How long prior this trip did you make your booking? \_\_\_\_\_ Days.

16) How did you organize your present trip to Israel? And how much did you pay for it?

1. Traveling on an organized tour as part of a group. How much did the tour cost? \_\_\_\_\_  
Amount      Currency
2. Not part of a group, but bought a package deal in my home country. How much did the package cost? \_\_\_\_\_  
Amount      Currency
3. Not part of a group and did not buy any package deal.

17) During your stay in Israel, what was your main means of payment?    1. Credit Card    2. Cash    3. Other

18) Please indicate for the following items how much you and your family members/friends paid for each item (Amount & Currency). Please relate to:

- 1 – Payments before you came to Israel (in your home country)
- 2 – Payments during your trip (in Israel).

If you travelled on a package tour or on an organized tour – Please mark for each item if it was included in the package or in the organized tour, or not.

Please mark "X" if you don't remember the amount.

	Paid in your home country		Paid in Israel		Included in package?	
	Amount	Currency	Amount	Currency	Yes	No
1. Flight ticket					1	2
2. Transfers to / from the airport					1	2
3. Accommodation					1	2
4. Car rental (Including gasoline)					1	2
5. Guided tours					1	2
6. Convention registration fee					1	2
7. Entry tickets to sites					1	2
8. Transportation (Taxi, Bus etc.)					1	2
9. Food & drinks: restaurants					1	2
10. Food & drinks: grocery stores and markets					1	2
11. Shopping (gifts, souvenirs and other purchases)					1	2
12. Entertainment and Recreation					1	2
13. Medical expenses and health treatment					1	2
14. Gifts to Israeli residents (monetary)					1	2
15. Communication (Internet, telephone, cellular phone)					1	2
16. Other (Donations, Tuition, Study Fees, etc.)					1	2
17. Travel in other countries (Including Palestinian Authority)					1	2

19) Total Expenditure for your trip to Israel for all family members/friends, (Before arrival and in Israel)? \_\_\_\_\_  
Amount      Currency

20) In conjunction with your trip to Israel, have you been exposed to the slogan: "Two cities one break" ?

1. Yes
2. No

**21) Did you make any excursions to another country during your trip to Israel?**

1. Yes, please indicate:

2. No.

Country	No. of nights
1. Egypt	
2. Jordan	
3. Turkey	
4. Cyprus	
5. Greece	
6. Other	

**22) Please indicate if you visited the following places, if so how many nights (if any), have you spent in each one and which main type of accommodation you used in each place:**

Region	Did you visit?		No. of nights spent	Main accommodation		
	Yes	No		1. Hotel, Holiday, village, Kibbutz hotel	2. Friends	3. Other
1. Jerusalem	1	2		1	2	3
2. Tel Aviv - Jaffa	1	2		1	2	3
3. Eilat & The Red sea	1	2		1	2	3
4. Haifa	1	2		1	2	3
5. Netanya	1	2		1	2	3
6. Dead sea area	1	2		1	2	3
7. Tiberias & the Sea of Galilee Area	1	2		1	2	3
8. Golan Heights	1	2		1	2	3
9. Nazareth	1	2		1	2	3
10. Galilee Area	1	2		1	2	3
11. Negev Area (Southern Deserts)	1	2		1	2	3
12. Any other Area in Israel	1	2		1	2	3
13. Jericho	1	2		1	2	3
14. Bethlehem	1	2		1	2	3

**23) Which of the following sites did you visit on your trip to Israel?**

- |   |  |
|---|--|
| 1. Massada                              | 12. Jewish quarter in the old city/the cardo |
| 2. Akko (Acre)                          | 13. Mount of Olives Panorama                 |
| 3. Caesarea                             | 14. Old Jaffa                                |
| 4. Capernaum                            | 15. Church of the Annunciation               |
| 5. Yardenit, Baptismal Site             | 16. Yad vashem (holocaust museum)            |
| 6. Quasar el yahud                      | 17. Baha'i Gardens                           |
| 7. Western Wall (Wailing Wall)          | 18. Tel Aviv museum of art                   |
| 8. Tower of David                       | 19. City of David                            |
| 9. Israel Museum                        | 20. Namal tel aviv (promenade)               |
| 10. Church of the holy sepulcher        | 21. Al-Aksa Mosque                           |
| 11. Via Dolorosa, stations of the cross |  |

**24) Based on your experience, which site were you most pleased with? \_\_\_\_\_**

**25) In terms of maintenance (cleanliness, accessibility, etc...), which site were you most pleased with? \_\_\_\_\_**

**26) During your visit to Israel, which of the following activities did you take part in?**

- 1. Cultural events & festivals
- 2. Going to theaters
- 3. Folklore evening
- 4. Sea activities (swimming, diving)
- 5. Sport activities (tennis, golf, etc.)
- 6. Desert tours by special vehicle, (jeeps, etc.)
- 7. Activities, like bungee, rappelling, etc.
- 8. Bicycle trip
- 9. Daily guided tour
- 10. Bird watching
- 11. None of the above

**27) How far is the country of Israel from your daily interests? (Pick out just one category)**

- 1. Extremely close
- 2. Quite close
- 3. close
- 4. far
- 5. Very far

**28) How do you assess the risk of visitors facing a terrorist attack in Israel today? (Pick out just one category)**

- 1. Extremely high
- 2. Quite high
- 3. normal
- 4. low
- 5. Very low

**29) How Interested are you to know more about Israel? (Pick one category)**

- 1. I love to learn about Israel whenever I can
- 2. I frequently inform myself about it
- 3. I am occasionally interested
- 4. Not at all interested
- 5. I hate hearing or knowing about it

**30) Did your visit change your perception about Israel?**

- 1. Changed for the worst
- 2. Did not change my perception
- 3. Changed for the better

**31) Do you believe that you will return to Israel for a visit in the future?**

- 1. Certainly not
- 2. Probably not
- 3. Maybe
- 4. Probably yes
- 5. Certainly yes

**32) Please mark the gender & ages of all family members/friends, covered by this questionnaire.**

	YOURSELF		SECOND		THIRD		FOURTH		FIFTH		SIXTH		SEVENTH		EIGHTH	
	1. M	2.F	1. M	2.F	1. M	2.F	1. M	2.F	1. M	2.F	1. M	2.F	1. M	2.F	1. M	2.F
0-14																
15-24																
25-34																
35-44																
45-54																
55-64																
65+																

**33) What is your marital status?**

- 1. Married/with partner
- 2. Separated/Divorced
- 3. Widower/widow
- 4. Single

**34) What is your level of education?**

- 1. Primary school
- 2. Senior high school
- 3. Diploma
- 4. Degree
- 5. Master and above

**35) What is your employment status?**

- 1. Not employed
- 2. Employed
- 3. Retired

**36) In order to enable us to determine special needs of different groups in Israel, please indicate whether you are:**

1. **Jewish.** Please specify religious affiliation:  
 (1). Strictly Orthodox (2). Orthodox (3). Conservative (4). Reform (5). No affiliation (6). Other
2. **Christian**
  - (1) . Protestant. Please indicate what denomination or church, if any, do you identify with, most closely?  
 (a). Evangelical churches (b). Mainline churches (c). Historically black churches (d). Methodist
  - (2) . Catholic
  - (3) . Orthodox  
 (a). Greek Orthodox (b). Russian Orthodox (c). Other Orthodox
  - (4) . Other Christian  
 (a) . Evangelical churches (b). Other
  - (5) . No Affiliation
3. **Baha'i**                      6. **Buddhist**
4. **Moslem**                    7. **Other**
5. **Hindu**                      8. **No Affiliation**

**37) In conjunction with your trip to Israel, did you use any social media platform?**  
 (such as Facebook, TripAdvisor, Ctrip, Yelp etc.)

	Yes/ No	If Yes, please specify which was the main platform you used	If Yes, please specify the type/s of use you made of this platform (multiple choice) can choose more than 1 option
<b>Before</b> the trip	<ol style="list-style-type: none"> <li>1. Yes</li> <li>2. No</li> </ol>	<ol style="list-style-type: none"> <li>1. Google</li> <li>2. Facebook</li> <li>3. Twitter</li> <li>4. Instagram</li> <li>5. TripAdvisor</li> <li>6. Other ( _____ )</li> </ol>	<ol style="list-style-type: none"> <li>1. Booking a flight</li> <li>2. Booking accommodations</li> <li>3. Booking an attraction ticket</li> <li>4. Finding a tour guide</li> <li>5. Researching about the destination</li> <li>6. Reading travelers' reviews</li> <li>7. Sharing an experience (reviews, photographs etc)</li> </ol>
<b>During</b> the trip	<ol style="list-style-type: none"> <li>1. Yes</li> <li>2. No</li> </ol>	<ol style="list-style-type: none"> <li>1. Google</li> <li>2. Facebook</li> <li>3. Twitter</li> <li>4. Instagram</li> <li>5. TripAdvisor</li> <li>6. Other ( _____ )</li> </ol>	<ol style="list-style-type: none"> <li>1. Booking a flight</li> <li>2. Booking accommodations</li> <li>3. Booking an attraction ticket</li> <li>4. Finding a tour guide</li> <li>5. Researching about the destination</li> <li>6. Reading travelers' reviews</li> <li>7. Sharing an experience (reviews, photographs etc)</li> </ol>

**38) Comments (We would be grateful for any comments or proposals you may wish to make):**

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**MANY THANKS. HAVE A PLEASANT JOURNEY, SHALOM AND SEE YOU AGAIN**

שאלונים

Type2

Dear Passenger,

The Israel Ministry of Tourism is conducting a survey among a sample of passengers departing from Israel; the survey is designed to provide basic data on tourism to Israel, in order to assist us in improving tourism services.

Please take a few moments to answer this questionnaire.

**THIS QUESTIONNAIRE REFERS TO ALL FAMILY MEMBERS/FRIENDS TRAVELLING TOGETHER WITH SHARED EXPENSES, OR A PERSON TRAVELING ALONE.**

**1) WHAT IS YOUR PERMANENT COUNTRY OF RESIDENCE?**

1. Country \_\_\_\_\_
2. City/ State/ Region \_\_\_\_\_
3. Nationality \_\_\_\_\_
4. Zip code \_\_\_\_\_

**2) HOW MANY NIGHTS DID YOU SPEND IN ISRAEL? \_\_\_\_\_ Nights.**

**3) PLEASE INDICATE THE NUMBER OF PERSONS, INCLUDING ALL FAMILY MEMBERS/FRIENDS, COVERED BY THIS QUESTIONNAIRE. \_\_\_\_\_ Persons.**

**3a). HOW MANY OF THEM ARE UNDER THE AGE OF 15? \_\_\_\_\_ Children.**

**4) DID YOU COME TO ISRAEL WITH GROUP ORGANIZED BY ANY ORGANIZATION?**

1. Yes. Please specify:
  - A. Christian Church
  - B. Jewish Organization
  - C. Human /Social organization
  - D. Other
2. No

**Question no. 5 is only for those who answered "yes" in the last question:**

**5) PLEASE INDICATE THE NUMBER OF PERSONS IN YOUR GROUP \_\_\_\_\_ Persons.**

**6) WHAT WAS THE MAIN PURPOSE OF YOUR VISIT TO ISRAEL? (CHOOSE ONLY ONE ANSWER)**

1. Leisure, Recreation and Holidays
2. Touring, sightseeing the country
3. Religious tour, Pilgrimage, Holy Land tour
4. Visit friends and relatives
5. Convention, Congress, Exhibition
6. Business, Professional, Government, Official mission
7. Wellness, SPA
8. Medical treatment
9. Research, Study
10. Taglit
11. Bird watching
12. Hiking
13. Other

**7) IS THIS YOUR FIRST VISIT, OR A RETURN VISIT TO ISRAEL?**

1. First visit
2. Return visit

**(If it's not your first visit):**

**7a) WHEN WAS YOUR LAST VISIT IN ISRAEL?**

**(Please indicate year): \_\_\_\_\_**

**8) WHAT WAS THE PRINCIPAL TYPE OF ACCOMMODATION YOU USED IN ISRAEL:**

**(CHOOSE ONLY ONE)**

1. Hotel, Kibbutz hotel, Holiday village
2. Youth hostel
3. Christian hospice
4. B&B in a rural area
5. Vacation Rentals (e.g. AirBNB, Couchsurfing)
6. Friends, relatives
7. Holiday, dwellings/Time sharing
8. Secondary residence
9. Other

**Question no. 9 is only for those who marked 1 in the last question:**

**9) WHAT WAS THE GRADE OF YOUR ACCOMMODATION?**

1. High level (5 stars hotel)
2. Medium level (3-4 stars hotel)
3. Low level (1-2 stars hotel)
4. Other, Not classified

**Question no. 10 is only for those who marked 1-3 in the last question:**

**10) WHAT TYPE OF SERVICE DID YOU CHOOSE?**

1. Room only
2. Bed and breakfast
3. Half board
4. Full board

**11) WHICH OF THE FOLLOWING REASONS MOST INFLUENCED YOUR DECISION TO VISIT ISRAEL? (CHOOSE ONLY ONE)**

1. Recommendation of friends / family
2. Recommendation of a travel agent
3. Viewing of an advertising campaign
4. Recommendation of my corporation/ professional organization
5. Other: \_\_\_\_\_

**12) WHAT WAS THE MAIN SOURCE OF INFORMATION FOR YOUR VISIT IN ISRAEL? (CHOOSE ONLY ONE)**

1. Internet, Electronic Database information
2. Travel agency / Tour operator /Airline
3. Friends and relatives in Israel
4. Friends and relatives at home
5. Guide books
6. Advertising and publications
7. Israel government tourist information offices abroad
8. Media (T.V, newspapers, magazines, etc.)
9. Tourism fairs, exhibitions.
10. Community, church, organization
11. Other

13) HOW LONG PRIOR THIS TRIP DID YOU MAKE YOUR BOOKING? \_\_\_\_\_ Days.

14) HOW DID YOU ORGANIZE YOUR PRESENT TRIP TO ISRAEL? AND HOW MUCH DID YOU PAY FOR IT?

1. Traveling on an organized tour as part of a group. How much did the tour cost? \_\_\_\_\_  
Amount    Currency
2. Not part of a group, but bought a package deal in my home country. How much did the package cost? \_\_\_\_\_  
Amount    Currency
3. Not part of a group and did not buy any package deal.

15) DURING YOUR STAY IN ISRAEL, WHAT WAS YOUR MAIN MEANS OF PAYMENT ?    1. Credit Card    2. Cash    3. Other

16) PLEASE INDICATE FOR THE FOLLOWING ITEMS HOW MUCH YOU AND YOUR FAMILY MEMBERS/ FRIENDS PAID FOR EACH ITEM (AMOUNT & CURRENCY). RELATE TO PAYMENTS BEFORE YOU CAME TO ISRAEL- IN YOUR HOME COUNTRY OR DURING YOUR TRIP- IN ISRAEL (OR BOTH). IF YOU TRAVELLED IN A PACKAGE OR AN ORGANIZED TOUR – PLEASE MARK FOR EACH ITEM IF IT WAS INCLUDED IN THE PACKAGE OR ORGANIZED TOUR, OR NOT. PLEASE MARK "X" IF YOU DON'T REMEMBER THE AMOUNT.

	PAID IN YOUR HOME COUNTRY		PAID IN ISRAEL		INCLUDED IN PACKAGE?	
	AMOUNT	CURRENCY	AMOUNT	CURRENCY	Yes	No
1. Flight ticket					1	2
2. Transfers to / from the airport					1	2
3. Accommodation					1	2
4. Car rental (Including gasoline)					1	2
5. Guided tours					1	2
6. Convention registration fee					1	2
7. Entry tickets to sites					1	2
8. Transportation (Taxi, Bus etc.)					1	2
9. Food & drinks	XXXXX	XXXXX			1	2
a. restaurants	XXXXX	XXXXX				
b. grocery stores and markets	XXXXX	XXXXX				
10. Shopping (gifts, souvenirs and other purchases)	XXXXX	XXXXX			XXXXX	
11. Duty Free Shop In Israel	XXXXX	XXXXX			XXXXX	
12. Entertainment and Recreation	XXXXX	XXXXX			1	2
13. Medical expenses and health treatment					1	2
14. Gifts to Israeli residents (monetary)	XXXXX	XXXXX			XXXXX	
15. Communication (Internet, telephone, cellular phone)					XXXXX	
16. Other (Donations, Tuition, Study Fees, etc.)	XXXXX	XXXXX			1	2
17. Travel in other countries (Including Palestinian Authority)					1	2

17) TOTAL EXPENDITURE FOR YOUR TRIP TO ISRAEL FOR ALL FAMILY MEMBERS/FRIENDS, (Before arrival and in Israel)? \_\_\_\_\_  
Amount    Currency

18) IN COMPARISON WITH THE AVERAGE FAMILY INCOME IN YOUR COUNTRY, IS YOUR FAMILY INCOME:

1. Higher than the average
2. Same as the average
3. Lower than the average

19) DID YOU MAKE ANY EXCURSIONS TO ANOTHER COUNTRY DURING YOUR TRIP TO ISRAEL?

1. Yes, please indicate:
2. No.

Country	No. of nights
1. Egypt	
2. Jordan	
3. Turkey	
4. Cyprus	
5. Greece	
6. Other	

**20) Which of the following sites did you visit on your trip to Israel?**

- |   |  |
|---|--|
| 1. Massada                              | 14. Jewish quarter in the old city/the cardo |
| 2. Qumran                               | 15. Mount of Olives Panorama                 |
| 3. Akko (Acre)                          | 16. Old Jaffa                                |
| 4. Beth Shean                           | 17. Church of the Annunciation               |
| 5. Caesarea                             | 18. Yad vashem (holocaust museum)            |
| 6. Capernaum                            | 19. Baha'i Gardens                           |
| 7. Yardenit, Baptismal Site             | 20. Tel Aviv museum of art                   |
| 8. Quasar el yahud                      | 21. City of David                            |
| 9. Western Wall (Wailing Wall)          | 22. Namal tel aviv (promenade)               |
| 10. Tower of David                      | 23. Cave of the Patriarchs                   |
| 11. Israel Museum                       | 24. The garden tomb                          |
| 12. Church of the holy sepulcher        | 25. Al-Aksa Mosque                           |
| 13. Via Dolorosa, stations of the cross | 26. Other                                    |

**21) BASED ON YOUR EXPERIENCE, WHICH SITE WERE YOU MOST PLEASED WITH? \_\_\_\_\_**

**22) IN TERMS OF MAINTENANCE (CLEANLINESS, ACCESSIBILITY, ETC...), WHICH SITE WERE YOU MOST PLEASED WITH? \_\_\_\_\_**

**23) DURING YOUR VISIT TO ISRAEL, WHICH OF THE FOLLOWING ACTIVITIES DID YOU TAKE PART IN?**

- |   |   |
|---|---|
| 1. Cultural events & festivals                    | 7. Activities, like bungee, rappeling, etc. |
| 2. Going to theaters                              | 8. Bicycle trip                             |
| 3. Folklore evening                               | 9. Daily guided tour                        |
| 4. Sea activities (swimming, diving)              | 10. Bird watching                           |
| 5. Sport activities (tennis, golf, etc.)          | 11. None of the above                       |
| 6. Desert tours by special vehicle, (jeeps, etc.) |   |

**24) FOLLOWING YOUR STAY IN ISRAEL, HOW WOULD YOU RANK THE FOLLOWING?**

	Excellent	Very good	Good	Fair	Poor
** Overall satisfaction	5	4	3	2	1
** Tourist Information office	5	4	3	2	1
1. Value for money	5	4	3	2	1

**25) DO YOU BELIEVE THAT YOU WILL RETURN TO ISRAEL FOR A VISIT IN THE NEAR FUTURE?**

1. Certainly not    2. Probably not    3. Maybe    4. Probably yes    5. Certainly yes

**26) PLEASE GIVE YOUR GENDER & AGE.**

GENDER	YOURSELF	
	M	F
0-14		
15-24		
25-34		
35-44		
45-54		
55-64		
65+		

**27) IN ORDER TO ENABLE US TO DETERMINE SPECIAL NEEDS OF DIFFERENT GROUPS IN ISRAEL, PLEASE INDICATE WHETHER YOU ARE:**

- 1. **Jewish.** Please specify religious affiliation:  
 (1). Strictly Orthodox (2). Orthodox (3). Conservative (4). Reform (5). No affiliation (6). Other
- 2. **Christian**  
 (1) . Protestant. Please indicate what denomination or church, if any, do you identify with, most closely?  
 (a). Evangelical churches (b). Mainline churches (c). Historically black churches (d). Methodist  
 (2) . Catholic  
 (3) . Orthodox  
 (a). Greek Orthodox (b). Russian Orthodox (c). Other Orthodox  
 (4) . Other Christian  
 (a) . Evangelical churches (b). Other  
 (5) . No Affiliation
- 3. **Baha'i**                      6. **Buddhist**
- 4. **Moslem**                    7. **Other**
- 5. **Hindu**                      8. **No Affiliation**

**28) IN CONJUNCTION WITH YOUR TRIP TO ISRAEL, DID YOU USE ANY SOCIAL MEDIA PLATFORM ?**  
 (such as Facebook, TripAdvisor, Ctrip, Yelp etc.)

	Yes/ No	If Yes, please specify which was the main platform you used	If Yes, please specify the type/s of use you made of this platform (multiple choice) can choose more than 1 option
Before the trip	1. Yes 2. No	1. Google 2. Facebook 3. Twitter 4. Instagram 5. TripAdvisor 6. Other ( _____ )	1. Booking a flight 2. Booking accommodations 3. Booking an attraction ticket 4. Finding a tour guide 5. Researching about the destination 6. Reading travelers' reviews 7. Sharing an experience (reviews, photographs etc)
During the trip	1. Yes 2. No	1. Google 2. Facebook 3. Twitter 4. Instagram 5. TripAdvisor 6. Other ( _____ )	1. Booking a flight 2. Booking accommodations 3. Booking an attraction ticket 4. Finding a tour guide 5. Researching about the destination 6. Reading travelers' reviews 7. Sharing an experience (reviews, photographs etc)

**29) COMMENTS (We would be grateful for any comments or proposals you may wish to make):**

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**MANY THANKS. HAVE A PLEASANT JOURNEY, SHALOM AND SEE YOU AGAIN**