



תל אביב  
יפו  
TEL AVIV  
YAFU



# 2030

TOURISM IN TEL AVIV

VISION AND MASTER PLAN



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**Tourism in Tel Aviv 2030** is the Master Plan for tourism in the city, which is derived from the City Vision released by the Municipality in 2017. The Master Plan was formulated by Tel Aviv Global & Tourism and the Strategic Planning Unit at the Tel Aviv Municipality.

The Plan was written by two consulting firms, Matrix and AZIC, and facilitated by an advisory committee of professionals from the tourism industry. We wish to take this opportunity to thank all our partners.

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# 2030

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“There is another industry we should develop, that will bring us great blessing and attract many tourists, visitors and people seeking cure. I am referring to developing our beachfront... We should develop places for amusement, recreation, visiting and so on. I have no doubt that if we arrange all these things on our beach, many will come visit us...”

**Meir Dizengoff, the first mayor of Tel Aviv**

Except from “Developing Tel Aviv”

Published by the Tel Aviv Municipality, 1932



Photo: Reuven Gross, Courtesy of the Municipal Archives





Photo: Daniel Klein, unsplash



Shalom,

In the past few years, we have been witnessing a tourism miracle. Tel Aviv-Yafo used to be a small city that only few tourists visited. It remains a small city, but one whose name is now recognized globally and many people want to experience.

This miracle did not occur on its own. In the last 20 years, we have in effect turned the city upside down thanks to massive investments in scores of projects designed to upgrade tourism and heritage sites as well as cultural and sports venues. These investments, which have positioned Tel Aviv-Yafo's tourism infrastructure on an equal footing with leading cities in the world, have been a key factor in making the city what the New York Times called "The Capital of Mediterranean Cool." The projects carried out in the city include the upgrade of the seaside promenade and linking 14 kilometers of beach from Herzliya to Bat Yam; Jaffa Port and Old Jaffa; Clock Tower Square and the Flea Market; the historic train station; the Sarona Templer Colony; Expo Tel Aviv – the largest and most advanced convention center of its kind in Israel; major cultural institutions: Heichal HaTarbut (Charles Bronfman Auditorium), Habima Theatre, Cameri Theatre, The Israeli Opera, Tel Aviv Cinematheque, and the Suzanne Dellal Centre for Dance and Theatre; bike paths and a bike-sharing service; Independence Trail; Tel Aviv Museum of Art; Museum of Natural History; Peres Center for Peace & Innovation; Menora Mivtachim Arena; Shlomo Group Arena, and Bloomfield Stadium.

Tel Aviv-Yafo's tourism boom has involved many partners that deserve special mention: first and foremost, the Ministry of Tourism, which has invested in numerous infrastructure projects in the city and launched a marketing campaign of unprecedented scope; the Ministry of Transportation, whose Open Skies initiative has greatly increased the number of direct flights to Ben Gurion Airport (TLV); and, of course – the city's vibrant hotel and tourism industry.

This Master Plan aims to sustain the tourism boom, manage it prudently and plan wisely for the future. Tourism in Tel Aviv-Yafo is a highly important economic engine for the city and the entire metropolitan area. However, if tourism is not managed sensibly, it can have negative implications for the city in the form of overtourism that adversely affects the locals' quality of life and the authentic fabrics of neighborhoods. This Master Plan will help us safely navigate the waters of tourism in the coming decade – in the hope that the prosperity and upsurge will continue to benefit the city's residents, the metropolitan area and Israel as a whole.

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Enjoy!  
Ron Huldai  
Mayor of Tel Aviv-Yafo





Shalom,

2019 has been a formative year for tourism. This year we hosted the Eurovision Song Contest – which, no doubt, was the largest international event ever held in the city in its 110 years of existence. The event offered us a rare opportunity to introduce the city to countless people and promote it as a destination – and we grabbed this opportunity with both hands.

The work on the Master Plan included an in-depth examination and analysis of the city from a tourism perspective. We carefully assessed our assets and advantages, but were also unwavering in confronting the challenges and flaws. Above all, we refined Tel Aviv's unique DNA as a tourist destination that rests on three firm pillars: the ancient city - Old Jaffa - which is our main attraction; the new city – Tel Aviv - which is characterized by phenomenal urban vitality; and, of course, the beach – with its extraordinary qualities.

I wish to thank all our partners for making our city one of the fastest-growing tourist destinations in the world. The love you have for Tel Aviv is moving and contagious.

---

Eytan Schwartz, CEO

Tel Aviv Global & Tourism



Shalom!

A city that people like to live in, work in, and have fun in is also a good city for visitors. In return, tourism contributes to a city when it completes it in various levels and adds to its daily routines.

The municipal vision for tourism aims to position our city as a leading urban destination, while constantly renewing the tourist product and prioritizing the concerns of the city's residents. We believe that the key to creating a good city for tourists is in finding the right balance between the needs of the locals and those of the visitors.

The Office of the City Engineer, together with other municipal units, has a crucial role in the city's development in many aspects that affect tourism: construction, the public sphere, hotel and accommodation planning, and the designing of new points of interest. All of these developments add to the tourism experience in the city.

I wish to thank all our partners in preparing this master plan, and wish us all continued cooperation.

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Arch. Udi Carmely

City Engineer

# Tel Aviv's Tourism Vision For 2030

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**The city will be a leading urban destination** that rests on three main pillars: Old Jaffa - the ancient part of the city; Tel Aviv - the new city, which is known for its vitality and creative energy and also draws businesspeople from around the world; and, primarily - the spectacular beach with its extraordinary qualities.





This ambitious vision was derived from the City Vision, the Strategic Plan released by the Tel Aviv Municipality in 2017. The Plan paints an image of the future in multiple areas of urban life. For the first time in Tel Aviv's history, tourism received separate attention equivalent to that of core municipal functions and services, such as education, community, local economy and planning. This change reflects the unprecedented growth of tourism in the city and underscores the importance of tourism to the livelihood of local residents and businesses, its effect on the urban fabric of life and its contribution to promoting the city's standing in the world.



# Tourism in Tel Aviv in 2018

## Hotels



**2,200,000**

Number of people who stayed at hotels in the city

International tourists: **1,500,000**

Israelis: **700,000**

Number of hotel rooms in the city: **10,500**

Number of hotel rooms in the metropolitan area (including Herzliya, Ramat Gan, Bat Yam): **12,700**

Average hotel revenue per guest: **\$645**  
(an increase of 11% compared to 2017)

The city's annual revenues from the hotel industry: **\$1.6 billion**

## Apartments in Tel Aviv that hosted tourists



**around 17,000**

The number of listings on Airbnb's website in 2018

The number of apartments that were actually rented for at least one night per month: **4,000-6,000**

The average cost per night of an apartment on Airbnb's website: **\$165**

The least expensive rental: **\$10**

The most expensive rental: **\$8,500**

**81% of the rentals** are for entire properties (as opposed to a room in an apartment)

## Tourists in the city by religious affiliation



**46%**  
Christians

Unaffiliated: **25%**

Jews: **24%** (of whom 61% are Conservative, 10.5% are Reform, 10% are Orthodox and 0.3% are Ultra-Orthodox)

Muslims: **2%**

## Tel Aviv's 5 largest source markets



**15%**  
France

USA: **12%**

Germany: **10%**

UK: **8.5%**

Russia: **8%**

## The reason for coming to Tel Aviv

Visits with friends and family: 27%

Tour: 26%

Business: 24%

Vacation: 15.3%

Medical: 2.7%

Conference, trade show: 1.6%

Pilgrimage: 1.2%

**Over 50%** of the tourists who come to the city are aged **25 to 45**

**92% of the tourists** were Free Independent Travelers (FIT) and only **8%** came with a group or organized tour

**75% of the tourists** in the city came on their own – without partners or family members

## Selected sites that were visited

70%

Old Jaffa



Tel Aviv Port: 42%

Tel Aviv Museum of Art: 5.5%

## Flights



66%

of the tourists came on traditional airlines and 34% on low-cost carriers

Ben Gurion Airport (TLV) is located about 20 km from Tel Aviv; **200 direct flights** from **120 different cities** land there every day

**60% of the tourists** book their travel less than one month in advance

## Tourists reported that they were most satisfied with

The beaches



Personal security

Warm reception by locals

## Tourists reported that they were least satisfied with

value for money



Taxis

The quality of information in foreign languages

The cleanliness of public areas

**Sources:** Incoming Tourism Survey, Ministry of Tourism, 2018  
Greater Tel Aviv Hotels Association, 2018  
The Center for Economic and Social Research at the Tel Aviv Municipality



# Tourism in Tel Aviv: An Overview



For many years, Tel Aviv conducted itself as a city in which tourism plays a relatively minor role in the local economy, which was also reflected in its planning. Despite its longstanding and widely deployed hotel infrastructure and the regular presence of tourists in the public space, Tel Aviv did not manage its tourism assets in keeping with their importance and inherent potential.

For many years, Tel Aviv conducted itself as a city in which tourism plays a relatively minor role in the local economy, which was also reflected in its planning. Despite its longstanding and widely deployed hotel infrastructure and the regular presence of tourists in the public space, Tel Aviv did not manage its tourism assets in keeping with their importance and inherent potential.

However, two parallel changes occurred in the past decade: On the one hand, tourism to Israel, in general, and to Tel Aviv, in particular, became a major and sought-after economic resource, supported by the central government in the form of increasing investments and witnessed by impressive and substantial growth. On the other hand, municipal investments during the last twenty years in tourism infrastructures, culture, content and inviting urban spaces led the city to be on a par with much larger destinations that host millions of tourists every year.

## **Infrastructure improvements include:**

1. Israel's international airport (TLV), where hundreds of direct flights from across the globe land every day.
2. Excellent hotels that offer a growing variety of rooms (even though there is still a shortage, as will be described in the relevant chapter).
3. A cutting-edge technology scene that draws business tourism to Israel and primarily to its economic hub, Tel Aviv
4. The Expo Tel Aviv convention center that meets the highest international standards.
5. The establishment of Tel Aviv Global & Tourism, a municipal corporation dedicated to the city's global development.

In 2019, these investments were fully utilized when the city hosted the Eurovision Song Contest, which introduced Tel Aviv to tens of millions of viewers across Europe and around the world. These developments have resulted in a quantum leap in the city's standing as a tourist destination - and require a change in how the urban tourism industry is perceived in municipal policy.



# Tel Aviv's Assets as a Tourist Destination



## Beaches

14 km of golden sands and warm Mediterranean water.

## Jaffa

One of the most ancient port cities in the world.

## Vibrant urbanism

The "nonstop city" is not just a slogan: Tel Aviv celebrates art, culture, superb food, nightlife, fashion, shopping and an inviting and safe public space.

## It's fun to be a tourist here

300 days of sun a year, a flat city, and life-size and doable proportions make Tel Aviv a great place to stroll around in.

## Values

Tel Aviv embraces everyone; is a home to all minorities; and actively promotes democracy and tolerance.

## An international business center

"The startup city of the startup nation": there are 1,700 startup companies in Tel Aviv – the largest concentration in the world per capita or per km<sup>2</sup>; there are dozens of international R&D centers, offices of multinational corporations, academic programs, and innovation-oriented tourism products.

## National heritage

Tel Aviv is where the State of Israel was established, where the pre-State underground movements planned their operations, and where the Hebrew language was revived; during the 40-year period between the founding of the city in 1909 and the establishment of the State of Israel in 1948, the nation was shaped in Tel Aviv.

## Architectural heritage

The historic downtown of Tel Aviv, known as the White City, was recognized as a World Heritage Site by UNESCO thanks to the largest concentration of International Style (Bauhaus) buildings in the world.

## A multicultural society

A city that is home to Jews, Muslims and Christians, native Israelis and newcomers, citizens and undocumented migrants, and the richest and poorest people in the country.

## A transportation hub

Tel Aviv is located in the center of the State of Israel and is a meeting place of railways and highways, close to the country's main international airport.

## A short drive to Israel's main tourist attractions

Just one hour from Jerusalem, 90 minutes from Nazareth and two hours from the Dead Sea: Tel Aviv is an ideal destination for the ultimate city break in Israel.



# Tel Aviv's Challenges as a Tourist Destination



## Vacation cost

Tourists are not exempt from the high cost of living in Israel. Many tourists praise the city, but complain about prices.

## Public transportation

The challenge faced by Israelis is equally challenging for tourists, who complain about the absence of a subway, an inefficient transportation system and traffic jams, in addition to the 'disappearance' of the buses on Saturday – the Jewish day of rest.

## Cleanliness

Whether it is trash in the public space or buildings whose facades have seen better days, tourists complain quite a bit about the city's run-down look.

## Accommodations

Tel Aviv is characterized by a shortage of hotel rooms, a lack of inexpensive hotels and a limited supply in different parts of the city.

## Shabbat (Saturday)

Even in the "nonstop city," quite a few sites and places of interest close on Friday afternoon and reopen on Sunday.

# Tourism Master Plan: Methodology and Structure



This Master Plan was written to facilitate the implementation of the city's tourism vision and its guiding principles. It defines policy guidelines, decision-making mechanisms and management routines for every matter that has bearing on tourism development in Tel Aviv. The Master Plan contains the following four chapters that are meant to steer all tourism-related operations in the city in the next decade.

1. **Tel Aviv as a Destination:** The city's tourism DNA and how to promote and sell it.
2. **Developing Tourism Infrastructures:** attractions, services and initiatives.
3. **Lodging:** hotels and alternative accommodations.
4. **Management:** a new approach to tourism management in the city.

The Master Plan was written by professional teams from two municipal bodies: Tel Aviv Global & Tourism and the Strategic Planning Unit, assisted by the Center for Economic and Social Research. The work on the Master Plan was facilitated by an advisory committee comprised of professionals from businesses and organizations engaged in tourism, the hotel industry, and cultural and recreational services in the city, as well as representatives from the Ministry of Tourism, the CEOs of municipal corporations that are active in tourism and recreation, and members of the public from all sectors of the population. Academic guidance was provided by the strategy consulting firms Matrix and AZIC, headed by Professor Yaniv Poria. We wish to thank all our partners.

A photograph of three women in white dresses performing a fire dance at night. They are holding umbrellas that have been set on fire, creating a dramatic effect with flames and smoke. The scene is illuminated by warm, orange and yellow light, likely from the fire and stage lights. The background is dark and out of focus, showing some blurred lights and figures.

# 1 Tel Aviv as a Destination

Photo: Tomer Poltin



# The City's Tourism DNA and How to Promote and Sell It

In the past decade, Tel Aviv has made significant strides as a tourist destination. It appears on prestigious lists that rank the trendiest urban destinations in the world and draws attention that is normally reserved for leading tourism capitals. Without a doubt, this constitutes a revolution in the city's history. Similar to the revolution experienced by the first Hebrew city in the 1930's when it was granted municipal status under the British Mandate, and to the major leap experienced by Tel Aviv in the 1970's and 1980's when it became a metropolitan center, in the past decade the city has been experiencing a third major development – having become a global city that draws millions of tourists and visitors every year.

## The city's tourism DNA

Tel Aviv's distinctiveness as a tourist destination rests on a unique mix of three pillars:

**Jaffa** – one of the most ancient port cities in the world which, according to various surveys and research projects, is the city's main attraction. Jaffa is home to sites with historical and religious significance: Old Jaffa, Jaffa Port, Clock Tower Square, the Flea Market and Yefet Street. Jaffa also has appeal thanks to its cultural, artistic and culinary offerings, shopping options, multiculturalism and diverse local traditions.

**Vibrant urbanism** – Tel Aviv is a pluralistic and spirited urban space with unique characteristics: culture, art, nightlife, superb food, and a safe and inviting public space; lively streets; a spiritual and religious life that respects a spectrum of faiths and beliefs; a city intertwined with Israel's national history; International-style ("Bauhaus") architecture that is closely identified with the city; a thriving LGBTQ community;





Photo: Guy Yechieli

pluralistic and egalitarian values; multiculturalism including a range of languages and religions; an intense entrepreneurial ecosystem that focuses on technology, startups and scientific breakthroughs; an international business center whose strongpoints are innovation and finance; compact proportions and flat land that are conducive to strolling around; a pleasant climate most days of the year; neighborhoods that are ethnically and culturally diverse.

**Beaches** – 14 km of golden beaches land are enhanced by beach facilities that are tightly managed by the Municipality, business establishments that dot the coast, and a boardwalk that extends from one end to the other.

In the coming years, continuing efforts will be made to develop, promote and sell the city as a tourist destination, while relying on three pillars: Jaffa, Tel Aviv, and the beach. The Municipality will give preference to initiatives, projects, attractions and services that are associated with these three pillars (see Chapter 2).



### Key target markets

Most tourists who come to Tel Aviv are from Western countries. Based on a survey of incoming tourism conducted by the Ministry of Tourism in 2017, the main source markets from which the tourists came are France (15%), USA (12%), Germany (10%), UK (8.5%) and Russia (8%). By extension, the majority of the tourists who came to Tel Aviv that year defined themselves as being Christian (46%), Jewish (24%) or unaffiliated with any religion (25%). Tel Aviv appeals in particular to young people (53% of the tourists are aged 25 to 45).

Tel Aviv's niche markets include vacation travel (and especially city breaks – namely, vacations during which the tourists stay in the same city), visits with friends and family, and business tourism. Each one of these market segments accounts for roughly 25% of all tourists in the city. Tel Aviv is also very popular among LGBTQ tourists.

**The focus on these target markets and niches will continue in the next decade as well, in addition to reaching out to growing markets and niches whose potential is still largely untapped:**

**MICE:** in the coming years, in line with strategic steps to position the city as a destination for large international gatherings, numerous efforts will be made to host international conferences, trade shows and exhibitions. To achieve that goal, the Municipality established an International Convention Bureau in 2018. It is the first collaboration of its kind between the Greater Tel Aviv Hotels Association, Expo Tel Aviv and Tel Aviv Global & Tourism.



**Tourism from China:** in 2018, and for the first time, China made the list of Tel Aviv's ten most important source markets. The number of Chinese tourists who come to the city is, however, negligible compared to the potential. In the coming years, increased efforts will be made to customize the Tel Aviv tourism product to the unique characteristics of the Chinese market, including the adoption of China Ready service quality standards by tour operators in the city.

**Muslim and Arab tourism:** in view of the sharp rise in the number of Muslim tourists – both from the Middle East and from Western countries – and against the backdrop of more cordial relations between Israel and its neighbors, more Muslim tourists are expected to come to Tel Aviv. An increase can already be seen among Arabs who live in Israel and in the Palestinian Authority.

**"Gray Hair" tourism:** the senior citizen niche has been steadily growing worldwide. Tel Aviv, which was named an age-friendly city by the World Health Organization in 2018, will actively reach out to this market.

**Jewish tourism:** the Municipality will take steps to underscore the key role played by Tel Aviv in the history of Israel and the Jewish people. The city will upgrade museums and other sites related to Jewish heritage, and increase the scope of tourism experiences related to Jewish history and the Jewish religion.



Photo: Ricky Rachman

## Promoting the city as a tourist destination

Tel Aviv is being promoted as a tourist destination through three main channels:

1. Two Cities, One Break – a large-scale advertising campaign run by the Ministry of Tourism. Backed by unprecedented funding, the campaign promotes Jerusalem and Tel Aviv as a single tourism product that has complementary features. Over a period of about four years, hundreds of millions of Israeli shekels were invested in Israel's ten main source markets. Additionally, dozens of Israel Government Tourist Offices overseas promote Tel Aviv as a major destination in the State of Israel.
2. PR and media relations – Tel Aviv Global & Tourism is in charge of the Municipality's international media relations. The special department it established in 2012 has significantly increased the city's exposure in traditional media (from 200 favorable articles in the international press in 2012 to 3,400 in 2018) and in new media (24 million exposures in 2018).
3. Promotion and marketing by tourist professionals – a large number of players in the local tourism industry, including dozens of hotels, operate independent marketing networks that target markets overseas.

Campaigns to encourage domestic tourism efforts to attract domestic tourists are carried out mainly by the Greater Tel Aviv Hotels Association with little municipal involvement or budgetary allocations. The Municipality's Media Relations Administration encourages Israelis to attend cultural, recreational and sports events held in the city. However, these efforts do not usually include attempts to persuade them to spend the night in the city.

**In view of Tel Aviv's growth as a destination for incoming tourism and international tourism, marketing activities will be expanded in the next decade in the following ways:**

- Closer cooperation with the Ministry of Tourism and greater influence on its marketing campaigns – while at the same time reducing the city's existing dependence on the Ministry by creating a sizeable and independent international marketing budget.
- A special marketing budget for domestic tourism, mainly to deal with crises in the hotel industry and low occupancy rates.
- Stronger collaboration with other cities in the metropolitan area that offer a variety of tourist attraction and sites, reflecting the belief that the whole is greater than the sum of its parts.
- Enhanced international media relations, which are a highly cost-effective way to promote the city.
- Greater use of digital channels for international marketing.



# 2 Developing Tourism



# The Attractions, the Services and the Initiatives We Will Develop

To continue developing Tel Aviv as a tourist destination, and in view of the sharp rise in the number of tourists in the city, it is necessary to prudently manage the establishment, upgrade and promotion of tourist attractions, services and other infrastructures. The tourism experience in the city will be enhanced by creating new attractions, improving and upgrading existing ones, developing infrastructures that support the City Break product – namely, infrastructures that encourage tourists to spend as many nights in the city as possible – and establishing shell infrastructures such as information centers, wayfinding signage, explanations in more languages, and improved transportation options.

**The following steps were taken in order to achieve an enhanced tourism experience in a well-planned manner:**

1. A city tourism map was defined, which will serve as a compass for future tourism planning
2. Tourism consumption patterns of present and future tourists were charted, in addition to identifying the advantages and weak points of tourism infrastructures in the city
3. A mechanism for prioritizing and advancing tourism projects was formulated, coupled with a pool of dozens of potential projects that can be advanced in the coming decade



Photo: Guy Yechieli



Photo: Tomer Poltin

### Defining the city's tourism map

The Master Plan defines 17 tourism zones – about half of which are existing zones and the other half are zones that are planned to contain significant tourist activity in the future. These zones are characterized by a varying mix of sites, attractions, tourism-related businesses, urban nature areas and hotels. The Master Plan stipulates that these zones will be given priority in future tourism development. It also outlines the special character of each zone and, by extension, the activities and initiatives that should be advanced in them. Apart from the well-known and obvious hubs, such as the coast and the White City, zones that have potential for future development were also identified – primarily ones intended for hotels and tourist attractions. A complete list of the zones appears in Appendix 1.

**It is worth noting that the Master Plan places special emphasis on sustainable development, which takes into consideration the needs and sentiments of residents and involves them in the tourism development efforts. The wellbeing of the city's residents is the primary concern underlying the Master Plan and its future implementation. This stems from the understanding that a balance must be struck between tourism growth and preserving the character of the neighborhoods and communities in which tourism operates.**

## Mapping the existing and future needs of tourists in the city

The advantages of Tel Aviv as a destination are reflected in academic research, surveys and information gleaned from tracking tourism websites. The prominent sites include: the vicinity of the coast and port, neighborhoods and/or areas that have a distinct look (Old Jaffa, Neve Tsedek, Rothschild Boulevard), and a number of heritage sites, markets and museums. Many of the attractions are located in the public space. Tourists also cite the local cuisine, nightlife, personal safety and friendliness of Tel Avivians as positive aspects of their visit.

The existing research also identifies the city's weak points as a destination. For example, Tel Aviv offers fewer tourist attractions compared to similar cities and none of them are in the must-see category. Furthermore, existing attractions (especially museums) have limited opening hours on the weekends, which is contrary to the character of the city. Additionally, many of the cultural venues do not cater to non-Hebrew speakers, and hardly any of the attractions in the city are open at night.

The Master Plan seeks to institute a mechanism for promoting tourism projects that will address the weaknesses of the city as a tourist destination. Apart from these weak points, two global processes characterizing tourism will also be taken into account. These processes are expected to have a dramatic impact on the nature of the tourists who come to the city in the coming decade, on the types of experiences they will want to have, and on their consumption patterns:

**New market segments:** as noted in Chapter 1, in the coming years we expect to see a sharp rise in the number of senior tourists, tourists from Asia (mostly from China), and visitors from Muslim countries. These groups have significantly different consumption patterns than those which we are familiar with in Tel Aviv.

**Changes in the nature of the popular attractions and sites:** according to tourism studies, tourists seek a larger number of experiences during their visit and spend a shorter amount of time at each one of them. The nature of tourist activity is also changing, witnessed by the declining prominence of classical sites. Tourists are more interested in global activities and experiences. Consequently, there is a need to develop places of interest in neighborhoods which do not typically attract tourists, while involving the local population and encouraging community tourism.



## Creating a mechanism for prioritizing and advancing tourism projects

The Master Plan suggests a detailed mechanism for initiating, establishing and managing tourism projects in the city. This mechanism ranks projects according to defined criteria: the appeal of the project, the quality of the proposed experience for a variety of audiences, the ability to regularly oversee the experience and its effect on the environment, economic feasibility, contribution to the local economy, innovativeness, and social responsibility. In addition to these criteria, the ventures and projects will also be assessed according to their compatibility with the character of the city, its needs, and the municipal objectives that were defined in the city vision and tourism map.

The proposed mechanism can be of use when establishing municipal projects and when examining private initiatives. Complete details about how the mechanism prioritizes projects can be found in Appendix 2.



Photo: Guy Yechieli



# 3 Lodging

# Hotels and Alternative Accommodations

The hotel industry in Tel Aviv is a unique market. Nearly all of the existing supply of hotel rooms is characterized by high prices. The average price per night for a hotel room in Tel Aviv in 2018 was \$210. Notwithstanding the high prices, hotels in the city are in very high demand (with an average occupancy rate of 74% compared to the national average of 62%). And in terms of geographical spread, the vast majority of the hotels in Tel Aviv are located near the beach. In 2018 there were 10,500 hotel rooms in the city – most of them along the coast. The nearby cities of Bat Yam, Ramat Gan and Herzliya offered another 2,400 rooms – most of which are also along the coast. An analysis of tourism growth trends indicates that Tel Aviv will need twice as many hotel rooms by 2030 – namely, between 7,000 and 10,000 new hotel rooms.

Against the backdrop of the sharp rise in the number of tourists in Tel Aviv, coupled with the high prices charged by the hotels, the short-term apartment rental market is currently blooming. In 2018, Airbnb's website offered more than 17,000 rooms in Tel Aviv – one of the highest rates in the world compared to traditional lodging options. If one were to describe the situation at the end of 2018, the rental market for tourists in Israel is subject to few, if any, laws, and those laws which do exist are only minimally enforced.

The hotel industry in Tel Aviv is also characterized by a near-total absence of incentives to build and operate hotels. Unlike the central government, the Tel Aviv Municipality does not offer monetary or other incentives to build hotels. Consequently, there is a large disparity between the planned supply of rooms and the actual number that are built. Numerous other challenges have a critical effect on the hotel industry in the city – including a manpower shortage, a lack of international hotel chains, and overregulation in some matters – which are not addressed on the municipal level despite their direct impact on this economic sector in the city.

In view of the above, this Master Plan recommends that hotels and lodging become a strategic priority of the Tel Aviv Municipality in the coming decade. The objective should be to quickly and substantially increase the supply of rooms for tourists, while taking into consideration the sentiments of residents and the need for a diverse geographical spread:

1. **Accelerating the construction of new hotels** by advancing land use plans that include hotels and the expedited issue of permits.
2. Placing greater emphasis on **converting office buildings into hotels**.
3. **Making stepped-up efforts to regulate the rental market** for tourists.



Coupled with the above recommendations, it is also advisable to establish a new department at Tel Aviv Global & Tourism – hotel development. The intention is to expediate processes at city hall that affect the construction of new hotels and to help the existing hotels deal with the challenges they face.

### Accelerating the construction of new hotels:

In 2018 there were 10,500 hotel rooms in use in Tel Aviv, in addition to around 12,000 rooms in different stages of planning: approximately 5,000 rooms are included in approved plans (of which about 1,700 are in the northwestern part of the city); approximately 6,000 rooms are in an advanced planning stage; and another 1,000 rooms are included in plans to convert existing buildings into hotels under a special use arrangement.

At present, most of the hotels are located along the coast, in the historic zones in downtown Tel Aviv and North Yafo, and in the business district surrounding Rothschild Boulevard. Future plans extend the hotel map to other parts of the city, including the northern section of the coast, the metropolitan business center and the vicinity of the planned mass transit stations.

**Relying on the "green track" method, the Master Plan establishes a new municipal protocol for expediting the construction of new hotels. The protocol includes work routines as well as the following: a commitment to cut waiting times; improved collaboration with the relevant departments at city hall (Planning Division, Construction Oversight Division, Business Licensing Division, and Tel Aviv Global & Tourism); management of an updated database of all real estate development, planning and construction processes relevant to the hotel business; and the introduction of an information, assistance and facilitation system for entrepreneurs.**

### Converting existing buildings into hotels:

In recent years, most of the added hotel rooms in the city came from the conversion of existing buildings into hotels. Besides the shorter time it takes to convert an existing building into a hotel compared to putting up a new one, real estate developers receive substantial financial incentives from the Ministry of Tourism for building conversions. This is also consistent with global trends, where hotels are built in industrial spaces and business districts.

In view of the advantages of the conversion track, the Master Plan calls on the Municipality to give greater preference in the coming years to converting buildings into hotels.

### Regulating the rental market for tourists:

In the past decade, renting out rooms and apartments to tourists has become widespread in many cities. This is primarily reflected in the traffic on Airbnb, but can also be seen in other platforms, such as Booking.com and social media. These rentals have positive effects, but also pose numerous challenges to the cities where they are popular. Based on information gathered by the Municipality, it appears that

rental rate to tourists in Tel Aviv are among the highest in the world. In 2018, the Airbnb website offered over 17,000 properties in the city – a rate that is exceptionally high compared to other cities. The prices of apartments rented to tourists in Tel Aviv are also among the highest in the world. Additionally, the increase in supply is among the fastest worldwide. In certain neighborhoods, the percentage of apartments that are rented to tourists – whether on a regular basis or just on occasion – accounts for more than 10% of all apartments in the neighborhood. Furthermore, together with the thousands of residents who offer a single apartment through Airbnb, 40% of the tourist rental market is in the hands of investors and businesspeople, who make up only 7% of all apartment owners who are active on the Airbnb platform.

The increased number of rentals to tourists in recent years has produced a lively public discourse regarding this trend. Although many apartment owners enjoy added income, and despite the undisputed benefits of being able to provide accommodations to a larger number of tourists in the city, there is growing dissatisfaction among residents due to the effect these apartment rentals have on the cost of housing and on the neighborhood and community fabric. Hotel owners in the city, who are important partners in promoting Tel Aviv as a tourist destination, also complain about the absence of regulation and oversight in this market.



Photo: Kfir Bolotin



The Master Plan stipulates that starting in 2019, the Municipality will take active measures to reduce the number of apartments that have in effect become hotels. The Municipality encourages residents to host tourists in their homes or to rent out their apartments while they themselves are vacationing somewhere else. But it objects to the new situation which has emerged, where thousands of apartments are no longer available on the rental market for Israelis and cater solely to tourists. To maintain a balanced rental market which, on the one hand, meets the burgeoning demand by tourists and preserves the residents' quality of life, on the other, the Municipality will take steps together with the Government of Israel to regulate apartments that are rented only to tourists.



An aerial photograph of a city at dusk, with a color overlay transitioning from purple at the top to orange at the bottom. The city skyline is visible in the background, with several tall buildings illuminated. The foreground shows a dense residential area with many smaller buildings and trees.

4

# Tourism Management in the City

Like any other destination in the world, tourism in Tel Aviv is influenced by multiple agencies and organizations that are active in this field: hotels, site operators, and other people who provide services to tourists. Within the Municipality itself there are various departments and companies that have a connection with the local tourism industry. There are no well-ordered routines governing their joint work, no clear divisions of areas of responsibility, nor a shared work plan. In addition to Tel Aviv Global & Tourism, which is entrusted with promoting and marketing Tel Aviv as a tourist destination and developing tourism experiences and products in the city, the following municipal departments and agencies are also involved in tourism-related matters:

**Atarim** is a municipal corporation in charge of developing and managing the coastline, Old Jaffa, Jaffa Port, Tel Aviv Port, the Marina, and the historic train station; **the Governance of Yafo** is responsible for developing and promoting Yafo (Jaffa), including its tourism-related aspects; **Expo Tel Aviv** (formerly Tel Aviv Fairgrounds) is a municipal corporation that manages the main convention center in the city; and **Gane Yehoshua** is a municipal corporation that manages parks that are replete with tourist attractions. The work done by other municipal departments also affects the supply and variety of tourist attractions, such as the **Culture Division, the Operations Division, the Engineering Administration**, which includes the **City Planning Division** that advances hotel construction; the **Business Licensing Division** that issues licenses to business establishments; and the **City Architect's Office**, which drives projects that affect tourism in the city.

At present, the city's operations pertaining to tourism are neither coordinated nor integrative. Furthermore, even Tel Aviv Global & Tourism operates without a multiannual work plan. It relies on limited information sources and data and lacks formal coordination mechanisms that would ensure maximum efficiency in how the Municipality manages tourism in the city. For that reason, the work that is done is characterized by sporadic initiatives, on the one hand, and a reactive approach to trends and opportunities, on the other.

**Tel Aviv Global & Tourism should be defined as the agency which has overall responsibility for developing and managing tourism in Tel Aviv, and as the agency that the Municipality entrusts with forming tourism collaborations at the metropolitan level. This must be done while integrating and coordinating the operations of the other agencies and consolidating up-to-date and comprehensive information about the state and development of the tourism industry in the city and in the rest of Israel. This can be achieved in the following ways:**

1. **By adding functions that do not exist today:** a Tourism Product Development Department and a Hotel and Alternative Accommodations Development Department.
2. **By increasing Tel Aviv Global & Tourism's operating budget**, and increasing its sources of self-generated income.
3. **By instituting management routines** within the Municipality and with outside agencies.





### Adding new functions:

Tel Aviv Global & Tourism's existing organizational structure includes a tourism administration under which the following departments operate: International Convention Bureau, Incoming Tourism, Domestic Tourism, and Sales, Tours and Information Centers. There is also a Marketing Department that reports to the Director of International Media. To optimize its operations, it is advisable to add two more functions: a Tourism Product Development Department and a Hotel and Alternative Accommodations Development Department.

**Tourism Product Development Department** – will initiate, integrate and manage tourism projects, assist entrepreneurs who wish to establish tourism ventures, and integrate the city's operations pertaining to the development of tourism products. The department will be responsible for: **the ongoing development and enhancement of the tourism experience** in line with the city's policy guidelines and tourism vision; **consolidating development and promotion efforts** by creating a map of existing and planned tourist attractions and ventures in the city; **assisting entrepreneurs** and other people who wish develop tourism ventures or tourist attractions; and **carrying out quality control** and assessment of the operations of the various ventures, while making use of feedback and measurement mechanisms to achieve that. The department will also be engaged in **long-term planning, tracking and analyzing** relevant trends in global tourism, and **business development**, while improving Tel Aviv Global & Tourism's sources of self-generated income.

**Hotel and Alternative Accommodations Development Department** – will be a key function that expedites and manages accommodations development in the city. At present, the hotel market in Greater Tel Aviv suffers from a shortage of hotel rooms and a serious shortage of inexpensive hotel rooms relative to the ever-growing demand for accommodations in the city. The department will be expected to **provide a forecast and plans for different parts of the city**, track the execution of **new hotel construction and the conversion of existing buildings into hotels**, expedite planning and implementation procedures, serve as a **liaison between real estate developers and the Municipality**, connect real estate developers with property owners, and take steps to introduce a **system of incentives** and assistance to encourage the opening of new hotels in the city, in addition to creating a **"green track"** to streamline the process. The department will also help formulate municipal policy regarding alternative accommodations, platforms for shared accommodations, etc.

Aside from the two departments mentioned above, the existing departments will continue to operate as well, while expanding their resources and scopes of activity: the **Marketing Department** will work to increase sources of self-generated income and reduce the dependence on the Ministry of Tourism; the **International Convention Bureau** will expand its operations in order to draw more conferences to the city; the **Incoming Tourism and Domestic Tourism** departments will each act to increase the number of tourists who come to the city, the duration of their stay, and the amount of money they spend at local businesses.

### Transitioning to a business approach:

Tel Aviv Global & Tourism will increase its operating budgets and, by extension, its ability to impact tourism-related activity in the city. At the same time, it should develop capacities as an organization with a business orientation, while reducing its dependency on funding from outside agencies. Tel Aviv Global & Tourism will work to create business anchors and sources of income that will enable it to lead and impact tourism-related endeavors in the city. It will also assume additional tasks, some of which are now performed by other agencies.

In parallel with its regular operations, Tel Aviv Global & Tourism can maximize different aspects of its work to create business advantages for service providers and other stakeholders. This can be done while expanding the suite of services offered to tourists or incorporating the tourism experience. Among the projects that Tel Aviv Global & Tourism will lead in the coming decade, some will also be leveraged to create value or commercial viability so it can grow its sources of self-generated income. Over the course of the coming decade, it is advisable that Tel Aviv Global & Tourism increase its annual operating budget from NIS 10 million (NIS 8 million from the Tel Aviv Municipality and another NIS 2 million from self-generated income) to NIS 25 million. This increase is commensurate with the anticipated growth in the number of tourists in the city and the economic activity deriving from that growth.

### Instituting routines for managing tourism in the city:

To perform its tasks, Tel Aviv Global & Tourism and its various departments must maintain multiple and multifaceted ties with various agencies, both within and outside the municipal system. Each department should have regular meetings, logistical coordination and collaboration with agencies that are connected with or take part in its work. The aim is to be involved and have an impact on tourism-related activity in the city, the metropolitan area and the country to the greatest extent possible. Other objectives include creating synergies, channeling efforts in the desired directions and synchronizing operations in this complex and diverse industry. Complete details about the proposed management routines appear in Appendix 8.



Photo: Guy Yechieli





Photo: Ahuzot HaHof Municipal Corporation & Yahel Engineers



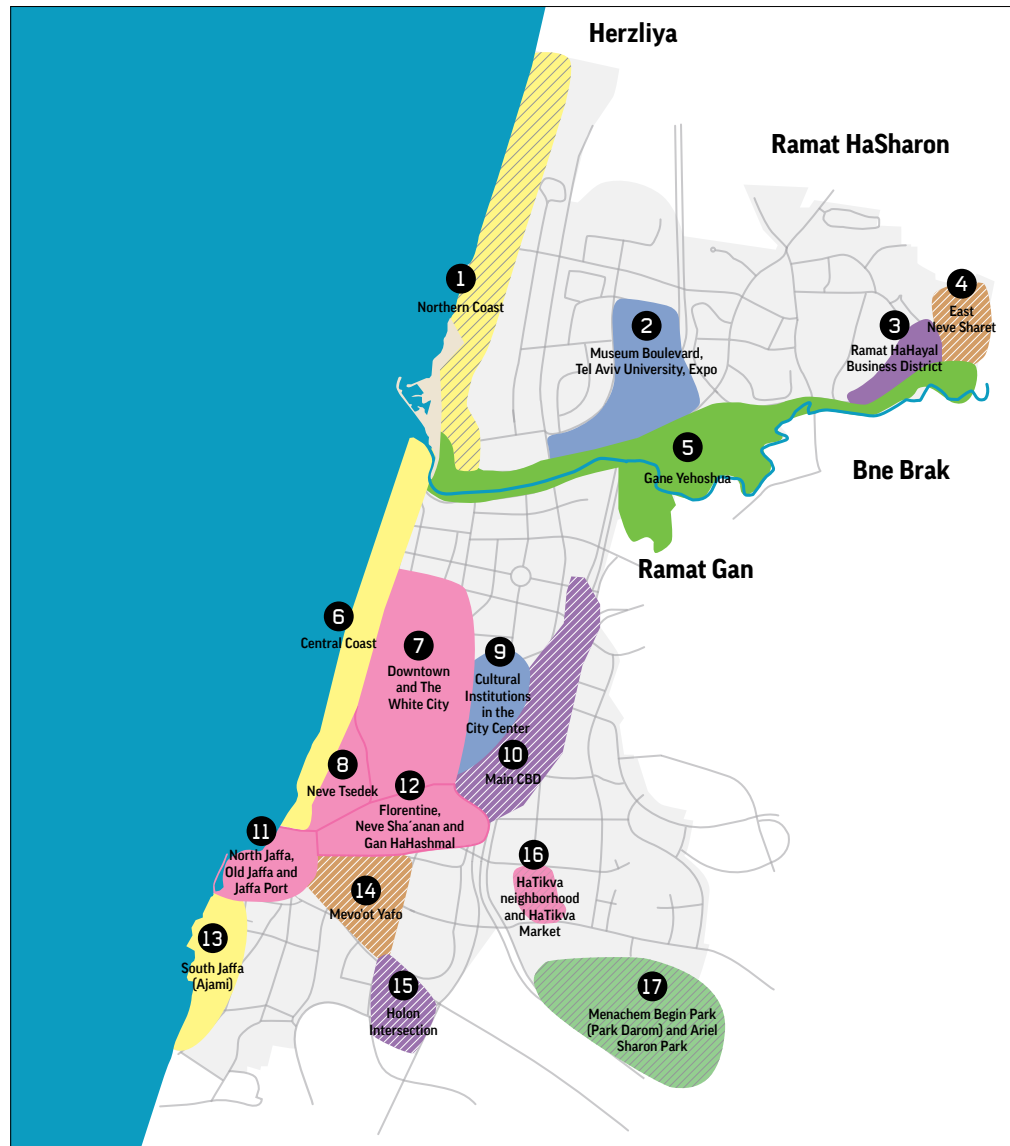


# --- Appendixes



# Appendix 1

## Tel Aviv's Tourism Map





## Tel Aviv's Tourism Map – Current and Future Development

### 1. Northern Coast (future plan):

A new urban area along the northern coast that is in the planning stages, which will include residential buildings, office buildings, shops and hotels (around 3,500 rooms).

**Suggested Development: developing it as a beach-oriented area and promoting its hotel potential**

### 2. Museum Boulevard, Tel Aviv University, Expo (formerly Tel Aviv Fairgrounds):

The city's Museum Mile that has a large concentration of institutions, most of which are dedicated to the heritage of the Jewish people (MUSA, Palmach Museum, Rabin Center, Museum of Natural History, Beit Hatfutsot). Tel Aviv University and Expo – the city's main convention center – are also in the vicinity. At present, this area has poor walkability, it suffers from a lack of recreation and entertainment options, the existing signage is inadequate, and it is detached from Gane Yehoshua.

**Suggested Development: improving the public space, and increasing walkability and connectivity among the existing cultural institutions.**

### 3. Ramat HaHayal Business District:

A business and recreational district, home to a major medical center (and another planned one in the Atidim area), dozens hi-tech companies and many popular restaurants.

**Suggested Development: adapting the area to business tourists and medical tourists, which would include building new hotels, making the public space more accessible and attracting more businesses that are open at night.**

### 4. East Neve Sharet - a future neighborhood (in the initial planning stages):

The neighborhood has tourism potential, including for new hotels.

### 5. Gane Yehoshua:

A spacious metropolitan park featuring a number of attractions and urban nature spots.

**Suggested Development: establishing a campsite as an inexpensive lodging alternative and encouraging various sports (jogging, cycling, fitness) in line with Tel Aviv's image as a wellness city.**

### 6. Central Coast:

The coast is the city's main attraction, along which most hotels are located. The public space and the ability to get to the downtown area must be improved; the facades of the buildings along the coast are not well maintained; many of Tel Aviv's strengths as a city of culture, art, cuisine and nightlife are not embodied in the businesses and services found along the coast.

**Suggested Development: advancing and implementing an action plan for the area between the boardwalk and HaYarkon Street in order create a first-rate and inviting public space; improving the access to the beach from other parts of the city; introducing additional attractions that will enhance the standing of the city's coast as the worldwide leader in its category; developing the water sports industry; holding international events on the beach and along the coast**

### 7. Downtown and The White City:

One of the most frequented tourist venues in the city, which offers a wealth of attractions, the bustling and popular Carmel Market, restaurants and nightlife, a young and diverse community, White City architecture and a large selection of hotels and apartments for rent. The downtown area features a variety of national heritage sites, some of which are not accessible in foreign languages. Furthermore, many of the International

Style (Bauhaus) buildings located in this area suffer from neglect and are falling apart.

**Suggested Development:** devising a strategy for restoring and upgrading Bauhaus buildings in the area; making information more available; increasing the appeal of national heritage sites to tourists (a large number of which are not under municipal ownership); developing community tourism

#### 8. Neve Tsedek and the Yemenite Quarter (Kerem HaTemanim):

Historic neighborhoods that appeal to tourists and are popular for strolling and shopping. The neighborhoods feature heritage sites, unique synagogues, restaurants and nightlife, proximity to the beach, and tourist and cultural attractions (primarily the historic train station and Suzanne Dellal Center for Dance and Theatre). In light of the above, these neighborhoods are showing signs of over-tourism.

**Suggested Development:** prudent tourism development that includes hotels, business establishments and services that are consistent with the area's unique ambiance; preserving existing community, cultural and social fabrics; developing community tourism that connects local residents with tourist activity; making information more available in the public space

#### 9. Cultural Institutions in the City Center:

The city center is replete with iconic buildings, cultural venues, museums, theaters, an opera house, shops, entertainment spots and restaurants (Tel Aviv Museum of Art, Cameri Theatre, Israeli Opera, Sarona, Givon Square). Despite their considerable appeal, the existing cultural venues are not maximizing their potential among incoming tourists.

**Suggested Development:** making information more available and encouraging tourists to visit these cultural venues; increasing the opening hours at cultural institutions; collaborating with hotels and travel agencies to promote these venues; improving the public space and the ability to get from place to place.



#### 10. Main CBD:

The business district features hi-rise office and residential buildings. Additional large-scale construction is planned for the area, which could include city hotels (mid-range), businesses open at night, restaurants and entertainment spots.

**Suggested Development:** intense and concerted efforts together with the Ministry of Tourism to convert old office buildings into hotels; incorporating hotel uses in new zoning plans; developing attractions as part of the project to build a park on top of Ayalon Highway

#### 11. North Jaffa, Old Jaffa and Jaffa Port:

Based on all the research and surveys that have been conducted, Jaffa is the city's main tourist attraction. It features places of interest to tourists and numerous religious and historic sites. Jaffa also has culinary appeal, nightlife, art, shops and a multicultural atmosphere. Despite its huge popularity, it is difficult to get from one part of Jaffa to another and strolling around or going from Old Jaffa to the Flea Market area is not a natural choice; a large share of the businesses at Jaffa Port have closed down and it draws few tourists in the middle of the week; the tourism space in Jaffa is limited to the historic zones and only few tourists visit its southern section; on certain days and times, there is a lot of traffic congestion at the entrance to Jaffa.

**Suggested Development:** developing and regulating tourist activity without adversely affecting the local population; enlarging the area where people can stroll around, and at the same time promoting sites of a religious, heritage and multicultural nature; leveraging the uniqueness of Jaffa to develop nighttime attractions and ones that are open on weekends; developing public space infrastructures; improving transportation infrastructure to and from and within Jaffa; defining a protocol for public space maintenance; developing community tourism in cooperation with local residents.

#### 12. Florentine, Neve Sha'anani and Gan HaHashmal:

Historic and bustling areas that feature unique restaurants, special shops and untapped urban potential. Despite the proximity between these neighborhoods, it is not easy to get from one to another.

**Suggested Development:** developing tourist activity based on art, street art and community tourism; developing an inviting public space for tourists; offering distinct accommodation options that rely on a young population, lower property prices compared to the downtown area, and the proximity to the Central Bus Station and a train station.

#### 13. South Jaffa (Ajami):

A historic area that is home to the majority of the city's Arab residents.

**Suggested Development:** maximizing the neighborhood's assets in a cautious and sensitive manner, while involving the local population in accommodations-related and home hospitality initiatives and promoting Jaffa's Arab heritage.



**14. Mevo'ot Yafo (a planned neighborhood at the entrance to Jaffa):**

This area, which for many years was industrial, is being transformed into mixed-use residential neighborhoods that include office buildings and commercial establishments, with possible potential for hotels as well.

**Suggested Development:** leveraging the new plan to incorporate a mix of hotels, office buildings, and cultural and art venues in old industrial facilities and flour mills.

**15. Holon Intersection (future business district):**

**Suggested Development:** leveraging the new plan to incorporate a mix of hotels, office buildings and cultural venues.

**16. HaTikva neighborhood and HaTikva Market:**

A unique residential area that is home to an authentic and active open-air market. The HaTikva neighborhood is well-known to Israelis and is closely identified with music, culture and sports. Additionally, a number of cultural institutions are located in the neighborhood, which is easily accessible because of its proximity to Ayalon Highway, the Central Bus Station and a train station.

**Suggested Development:** encouraging the opening of boutique hotels; promoting HaTikva Market as a tourist attraction; developing community tourism models; promoting the neighborhood's heritage that relies on a mosaic of ethnic groups, cultures and traditions.

**17. Menachem Begin Park (Park Darom) and Ariel Sharon Park:**

These two spacious parks have potential for developing attractions that can appeal to both domestic and incoming tourists.

**Suggested Development:** improving transportation access to the parks; developing attractions for large crowds that encourage repeat visits (amusement park / water park / ropes park / action sports park, etc.); developing alternative lodging options (camping, campervans, shipping containers).

# Appendix 2

## A Mechanism for Advancing, Prioritizing and Managing New Tourism Projects

Ideas for new tourism projects in the city can come from municipal sources, Ministry of Tourism policies, or private-sector initiatives. Until now, there was no mechanism at the Municipality for assessing or prioritizing tourism projects. The following guidelines are now being proposed for advancing such projects in the city:

**1. Preparing a project file that contains the following information:**

- A brief written description and explanation about how the project is consistent with goals /policy guidelines (the rationale)
- Physical and content-related characteristics
- Programming and activity-related characteristics
- Target audiences
- Basic business structure (profitability, BOT option, funding source, set up and ongoing costs)

**2. Assessing the project** according to the following criteria:

- **Attractiveness:** the project's contribution to the city compared to competing targets
- **Experience quality**
- **Oversight and control:** the ability to oversee the project during and following its execution
- **Feasibility:** from an economic, legal and municipal standpoint
- **Revenue:** the project's contribution to the local economy and community
- **Responsibility:** the kind of impact the project will have on residents, the community and the city's values
- **Upkeep:** to what extent the project will require regular renovations and upgrades

It is recommended that the projects be assessed by a committee. Apart from Tel Aviv Global & Tourism staff, it should be comprised of representatives from relevant municipal departments from the Engineering Administration, Operations Division, Community Administration, Media and Marketing Administration, and others.

If the project is approved, the next stages should be as follows:

- 3. Advancing the execution of the project in accordance with municipal procedure**, which includes managing a risk assessment table, overseeing the implementation and setting quality and success measures.
- 4. After completion, a project supervision routine will be instituted** for assessing the quality of service and maintenance, receiving data on a regular basis and creating a periodic feedback mechanism.

# Appendix 3

## Pool of Potential Tourism Projects

### Beach

- **24/7 beach:** for the first time in the world, the nonstop city presents a nonstop beach
- **Beach zipline:** an aerial cable extending from the top of the beach cliff to the water
- **Running over the water:** creating a new jogging experience by constructing an innovative running course over the water.
- **Gallery on the beach:** a collaboration with the Tel Aviv Museum of Art for exhibiting first-class art in the public space
- **Culture at the beach:** a collaboration with cultural institutions in the city for offering high-quality cultural activities at the beach, available in different languages
- **Cuisine at the beach:** encouraging top chefs in the city to operate restaurants long the coast
- **Lowering the cost of recreational activities at the beach:** expanding the Municipality's initiative to lower the cost of recreational activities at the beach and extending it to additional products: paddleball lending free of charge, single-use towels for a nominal fee, sunscreen sold at controlled prices, etc.
- **Amusement park on the beach:** a floating amusement park next to the coast for kids up to the age of 8, including trampolines, jumpers, an obstacle bridge, ladders, climbing wall, swings and playground
- **Water sports:** promoting and expanding the network of businesses and municipal services associated with water sports
- **Beach parties:** instituting a protocol approved by the Municipality and the Israel Police for holding parties on the beach
- **Ocean pool:** building a seawater pool in a small bay at one of the beaches
- **Coral reserve:** promoting scuba diving tourism at the Ajami coral reef

### Jaffa

- **The Jaffa Story:** a visitors center that will tell Jaffa's authentic, pluralistic and multicultural story, while highlighting the city's rich history, present challenges and different narratives that characterize it
- **Getting around in Jaffa:** improving the ability to get from one tourist site to another (the vicinity of the Clock Tower, Flea Market, Jaffa Port, Old Jaffa)
- **Tourist transportation:** finding solutions that address the large number of vehicles that enter Jaffa, such as a tourist train, shuttles, etc.
- **Cleaning and maintenance protocol:** in light of the growing and welcome influx of tourists, a special cleaning and maintenance protocol is needed at tourist sites in Jaffa
- **Christian Jaffa:** devoting comprehensive efforts to underscoring the tremendous importance that Jaffa has for the Christian religion, while improving the signage in the public space, training guides, and offering more tourism experiences
- **Muslim Jaffa:** promoting projects that spotlight Jaffa's Muslim culture
- **Celebrating Jaffa during Sukkot:** holding regular activities in Jaffa for domestic tourists during the intermediate days of the Sukkot holiday



- **Nighttime and weekend attractions:** given Jaffa's special character, projects that address the existing shortage of nighttime attractions in the city should receive priority as well as those that are open on weekends
- **Community tourism in Jaffa:** developing new tours, home hospitality and experiences that involve the community
- **Jaffa food market:** a weekly market in Jaffa where residents can offer their homemade cooking straight out of the pot

### Must-See Attractions

- **A museum that highlights the accomplishments of the Jewish people:** promoting an initiative that calls for establishing a museum dedicated to the accomplishments of the Jewish people, which will become a must-see attraction for every tourist who comes to the State of Israel
- **A new, international-standard amusement park:** an attraction for families – amusement park/water park, ropes park, action sports park
- **Hebrew language museum:** establishing a museum that highlights the linguistic miracle that occurred in the first Hebrew city, including the thousands of years of history of the Hebrew language, different languages spoken by Jews - some of which are now extinct, and the place assumed by contemporary Hebrew culture
- **LGBTQ museum:** establishing a museum dedicated to the one of the communities most identified with the city, with an emphasis on the values of tolerance and pluralism that characterize Tel Aviv

### Culture and Art

- **International art events:** drawing international cultural and art events to the city and globalizing existing events to increase their appeal to international audiences
- **Promoting the city's cultural institutions among tourists:** offering content in different languages and marketing them to key players in the tourism industry, travel agents, hotel concierges, and the tourist themselves
- **Extending the number of hours that museums in the city are open,** and in particular on weekends and holidays

### Transportation

- **Transportation for tourists on Shabbat:** a public transportation initiative that will enable tourists to get to and from tourist sites in the city and to and from the city and Ben Gurion Airport, which will also run on Friday evening and Shabbat
- **Shared mobility for tourists:** making the variety of shared mobility modes in the city available to tourists
- **An airport in the sea:** increasing the Municipality's involvement in the government's plan to build a new international airport on an island in the Mediterranean
- **Parking signs in English**
- **Making buses more English-friendly** – including maps and digital signage on buses

### Information and Services for Tourists

- **DigiTel for tourists:** a first-of-its-kind smart city card, that will provide information and encourage tourists to avail themselves of what the city has to offer based on their personal preferences and profile: age, areas of interest, geographical location and the type of experiences they want to have
- **Interactive signage** at tourist sites
- **Free tours:** offering a suite of free daily tours for tourists
- **New information centers in the following locations:** the beach, Tel Aviv Port, Jaffa Port, Sarona, Ben Gurion Airport, Magen David Square, Habima Square and Rabin Square
- **China Ready:** preparing the city for a wave of tourists from China, including training for guides, signs in Chinese at major tourist sites, interpretive signage and content in Chinese, and accepting Chinese means of payment at tourist sites
- **Thematic maps and maps in different languages:** a general upgrade of all the maps, information and printed materials provided to tourists; increasing the number of thematic maps, translating them into different languages, improving how they are circulated, etc.
- **Volunteers:** recruiting volunteers to work with tourists throughout the year
- **Customer service courses and English classes for City Hall employees:** creating a fixed syllabus for employees who come into contact with tourists, including lifeguards, beach staff, inspectors, members of the municipal security patrol, and others
- **Tourist police:** advancing a plan together with the Israel Police for increasing law enforcement presence at major tourist sites
- **Tourism space SLA:** introducing a binding protocol regarding the look, cleanliness and maintenance of tourism spaces, including a standard for street furniture, increased deployment of public restrooms, shade solutions, and more

### Tel Aviv Heritage

- **Coloring the White City in white:** a long-term plan for restoring the facades of Bauhaus buildings to their former glory and defining a protocol for what main streets in the White City should look like
- **Visitors center dedicated to the history of Judaism in the city:** including the legacy of Rabbi Kook, the Tel Aviv Rabbinate, and pluralistic streams in Judaism
- **The Lighthouse:** turning the lighthouse, the city's historic logo, into a tourist attraction
- **City history museum:** establishing a venue where people can learn about the history of the city, its current challenges and future development plans
- **Tel Aviv's birthday:** declaring one of the intermediate days of Passover as Tel Aviv's birthday and introducing an annual tour festival featuring itineraries in the city for domestic tourists

### National and Jewish Heritage

- **Upgrading museums run by the Ministry of Defense:** upgrading the exhibits and experiences at longstanding museums in the city that are run by the Ministry of Defense, including the Haganah Museum, Palmach Museum, Etzel Museum at Beit Gidi, Etzel Museum, and Lehi Museum
- **Aliyah Museum in Jaffa:** a visitors center dealing with the history of the waves of immigration to pre-State Israel that entered through the gateway to the Land of Israel – Jaffa Port
- **Israeli Spy Museum:** an enjoyable and experience-filled museum that tells the story of the Israeli intelligence organizations

- **Tours in the footsteps of the Pre-State underground movements:** reviving the legacy of the underground movements in the public space
- **Synagogue tours:** mapping synagogues that are tourist-friendly (regardless of the tourist's religion) and offering tours to those who wish to experience Jewish tradition and prayer
- **Rabin Memorial:** upgrading the visitor experience at the site where Yitzhak Rabin was assassinated, incorporating cutting-edge illustrative aids
- **Purim as an incoming tourism anchor:** promoting packages for partygoers based on the city's street party and private parties
- **Welcoming the Shabbat like a Tel Avivian:** a community tourism project that will introduce tourists to Tel Avivians, who will host them for a traditional Shabbat meal
- **Community tourism in neighborhoods:** expanding community tourism in the HaTikva neighborhood and extending the project to other neighborhoods, including Neve Sha'anani, Shapira, Jaffa and others

### Projects Around the City

- **Developing the tourism experience in the city's "Museum Mile":** enhancing the experience of strolling around as well as the connection between the five museums along Museum Mile on Haim Levanon Street: MUSA, Rabin Center, Palmach Museum, Museum of Natural History and Beit Hatfutsot
- **Advancing collaboration with Jerusalem:** by enhancing closer ties between the two cities and launching joint promotion of tourism projects
- **Advancing collaboration with cities in the metropolitan area:** promoting and marketing tourist attractions in nearby cities, including Ramat Gan, Bat Yam, Holon, Herzliya, Lod and Ramla
- **Digital tourism:** promoting travel tech startup companies among players in the local tourism industry and giving them preference in municipal tourism projects
- **Developing the hotel strip along the main section of the beach:** revising and implementing the action plan for the area between the boardwalk and HaYarkon Street in order to create a first-rate and inviting public space, improving the access to the beach from other parts of the city and improving the facades of residential buildings and business establishments in the area



# Appendix 4

## Number of Hotel Rooms in Tel Aviv In 2018

### Lodging Types

Type	Properties	Rooms
Hotel	114	9,157
Apartment hotel / suites	30	746
Hostel	19	558
<b>Total</b>	<b>163</b>	<b>10,461</b>

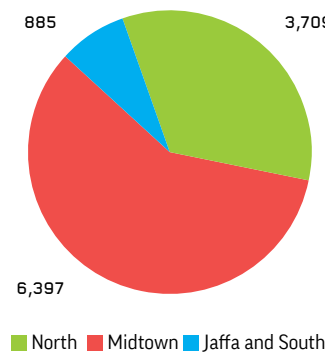
### Lodging Supply in Nearby Cities

City	Properties	Rooms
Herzliya	10	1,431
Ramat Gan	4	627
Bat Yam	2	182
<b>Total</b>	<b>16</b>	<b>2,240</b>

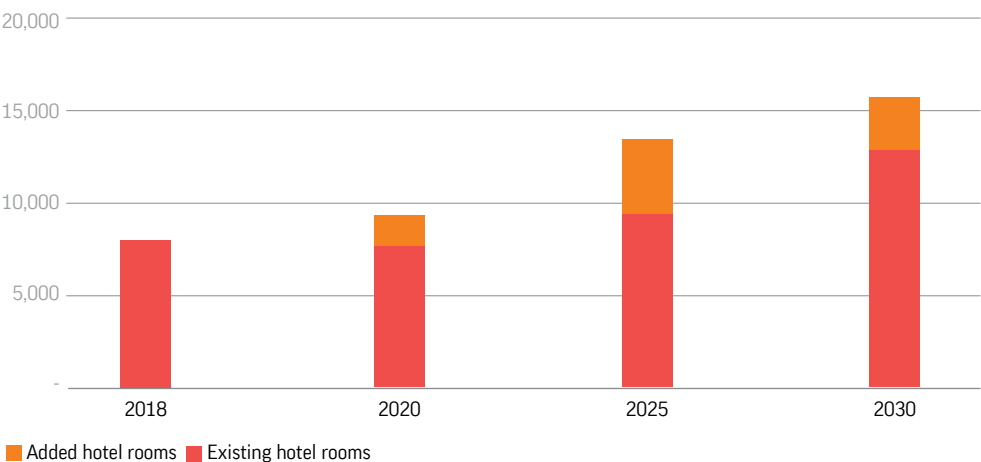
# Appendix 5

## Planned Supply of Hotels in Tel Aviv

Planning Potential in Tel Aviv –  
Planned Hotel Rooms by Part of the city



Forecasted Inventory of Hotel Rooms in Tel Aviv



# Appendix 6

## Forecasted Demand for Hotels in Tel Aviv 2018-2030

The preparation of the Master Plan included research that aimed to forecast future demand for hotels in the city. The research in question relied on a number of previous studies on the subject:

- The forecast made by the Ministry of Tourism (Esther Sultan, 2015) which projected an annual growth rate of 2.3% in tourism until the year 2030, based on global trends in the hotel industry.
- A internal municipal working paper (Pasternak, 2008) which estimated that the budget hotel sector would grow at the same rate as the overall growth in tourism.

The research presented below outlines two scenarios:

The official growth forecast made by the Ministry of Tourism is 2.3% per annum. However, an examination of the local trends in Israel and in Tel Aviv indicate that since 2016 the growth rate has been much higher than the aforementioned forecast. Whereas in 2015 **2.8 million tourists** came to Israel and there were **2.2 million hotel nights in Tel Aviv** - in 2017, there were **3.6 million tourists in Israel** and **2.6 million hotel nights in Tel Aviv**. In 2018, more than 4 million tourists came to Israel.

Furthermore, trends pertaining to the growth in global tourism indicate a consistent increase of around 5% in the past decade and there are no signs of a slowdown.

The expected increase in demand – working assumptions and base data<sup>1</sup>:

Number of tourists in Israel (excluding day visitors):	<b>3,614,143</b>
Number of tourists who spent the night in Tel Aviv:	<b>1,481,800</b>
Number of hotel nights of tourists in Tel Aviv:	<b>2,550,000</b>
Number of hotel nights of Israelis in Tel Aviv:	<b>826,000</b>
Total hotel nights in Tel Aviv:	<b>3,376,000</b>
Number of hotel rooms: [municipal data, 2018]	<b>8,076 (CBS) / 10,461</b>
Average number of hotel nights per foreign tourist:	<b>1.72</b>
Average number of hotel nights per domestic tourist:	<b>1.72 (working assumption)</b>
Number of hotel nights per room: [based on 8,076 / 10,461 rooms, respectively]	<b>322 / 418</b>
Additional rooms needed per 1,000 tourists: [based on 8,076 / 10,461 rooms, respectively]	<b>4.11 / 5.34</b>

<sup>1</sup> The data rely on data published by the CBS and Ministry of Tourism for the year 2017 unless noted otherwise in brackets.



**Expected Increase in the Number of Tourists Who Spend the Night  
in Tel Aviv, 2017-2030**

Year	2.3% Increase	5% Increase	7.5% Increase
2017	2,208,980	2,208,980	<b>2,208,980</b>
2018	2,259,787	2,319,429	2,374,654
2019	2,311,762	2,435,400	<b>2,552,753</b>
2020	2,364,932	2,557,170	<b>2,744,209</b>
2021	2,419,326	2,685,029	<b>2,950,025</b>
2022	2,474,970	2,819,280	<b>3,171,276</b>
2023	2,531,894	2,960,244	<b>3,409,122</b>
2024	2,590,128	3,108,257	<b>3,664,806</b>
2025	2,649,701	3,263,670	<b>3,939,667</b>
2026	2,710,644	3,426,853	<b>4,235,142</b>
2027	2,772,989	3,598,196	<b>4,552,778</b>
2028	2,836,768	3,778,105	<b>4,894,236</b>
2029	2,902,013	3,967,011	<b>5,261,303</b>
2030	<b>2,968,760</b>	<b>4,165,361</b>	<b>5,655,901</b>

# Appendix 7

## Properties in Tel Aviv Offered and Actually Rented on Airbnb May 2017 – April 2018

Month	No. of Properties Available on Airbnb by Month	No. of Properties Booked for at Least One Night	% of Booked Properties Out of All Available Properties by Month
May 2017	8,001	4,405	55.1%
June	8,478	4,942	58.3%
July	8,962	4,900	54.7%
August	9,655	5,165	53.5%
September	9,811	4,893	49.9%
October	9,568	5,737	60.0%
November	8,420	5,066	60.2%
December	8,681	5,196	59.9%
January	8,574	4,872	56.8%
February	8,162	3,973	48.7%
March	8,698	5,087	58.5%
April 2018	8,835	5,839	66.1%

### Breakdown of Properties in Tel Aviv Neighborhoods Offered and Rented on Airbnb, May 2017 – April 2018

Section of the city	No. of Properties in Each Section		Growth in %
	May 2017	April 2018	
City Center	2,248	2,330	4%
Midtown	1,371	1,561	(#5) 14%
Old North	1,001	1,009	1%
Yemenite Quarter (Kerem HaTemanim)	806	875	9%
Florentine	480	516	8%
Yafo (Jaffa)	431	478	11%
Neve Tsedek	282	331	(#4) 17%
Shabazi	243	301	(#2) 24%
Shapira	102	134	(#1) 31%
Yehuda HaMaccabi	107	132	(#3) 23%
Kikar HaMedina	119	126	6%
Ajami	100	113	(#6) 13%
Other (comprised of 38 sections and unknown)	711	929	31%
<b>Citywide Total</b>	<b>8,001</b>	<b>8,835</b>	<b>10%</b>



### Type of Lodging in Tel Aviv Offered on Airbnb May 2017 – April 2018

Property Type	Number in %
Entire Apartment	81%
Room in an Apartment	18%

No. of Rooms	No. of Properties
Studio	1,418
1 room	5,663
2 rooms	4,772
3 rooms	1,651
4 rooms	348
5+ rooms	98

Maximum Cost	Minimum Cost	Average Cost Per Night	Property Type
\$8,548	\$16	\$186	Entire Apartment
\$1,288	\$14	\$64	Private Room
\$81	\$10	\$32	Shared Room
		<b>\$165</b>	<b>Average</b>

# Appendix 8

## Tel Aviv Global & Tourism's Proposed Management Routines

Tel Aviv Global & Tourism will institute management routines that are based on extensive consultations, information sharing and participation in various municipal, metropolitan and national forums. Through a number of permanent forums, every staff member at Tel Aviv Global & Tourism will maintain regular contact with municipal and non-municipal agencies that interface with or are relevant to his or her position:

### Executive forum:

Regular meetings with the CEOs of municipal companies and other stakeholders who play a key role in tourism in the city will be instituted. The purpose of the meetings will be to coordinate operations and discuss issues at the macro level or prepare for or react to special events and opportunities. The members of the forum will also attend deliberations held by the city's management that have a bearing on tourism.

### Non-municipal forums:

**Cities in the metropolitan area:** initiating and leading discussions and meetings with tourism directors from cities in the metropolitan and other areas, whose activities affect or are affected by tourism development and management in Tel Aviv.

**Cities in Israel that are tourist destinations:** creating a consultation and collaboration mechanism that involves tourism directors from Eilat, Jerusalem, Haifa and other cities that are popular with foreign tourists, with the aim being to promote initiatives at the Ministry of Tourism and address local and global tourism trends.

### "Small circle" forums:

**Outside the Municipality:** in order to establish and maintain regular contact and collaboration between Tel Aviv Global & Tourism staff and their counterparts in other cities.

**Inside the Municipality:** in order to establish and maintain regular contact with relevant staff at City Hall and at municipal companies, for the purpose of promoting initiatives, monitoring implementation, sharing data and information, and optimizing daily operations.

**In the field:** in order to establish and maintain regular contact with people who work in the tourism industry, hotel owners and other stakeholders, for the purpose of receiving updates and feedback, fostering collaborations and advancing common interests.

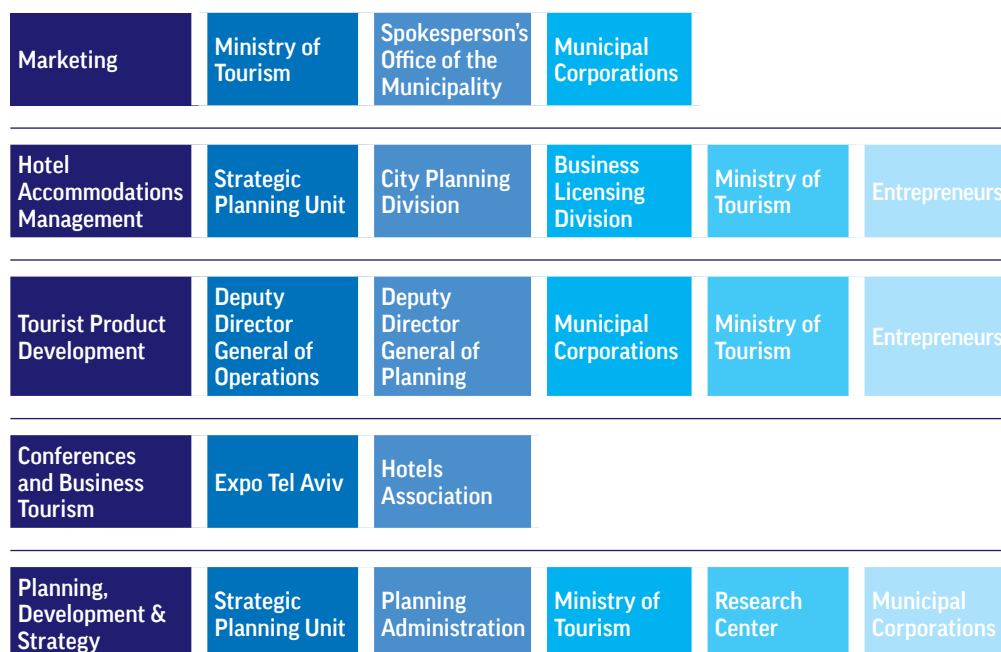
### Representing the tourism-related interests in municipal operations:

Numerous projects and work plans advanced by the Municipality can have a positive impact on tourism

or, alternatively, have the potential to adversely affect the tourism experience or tourism product in the city. At present, the tourism aspects of projects are not always clear to the entrepreneurs or individuals executing them. Furthermore, pertinent tourism-related considerations are not always taken into account in the decision-making process connected with a planned project or plan that are being advanced.

Incorporating tourism-related interests in municipal operations is a needed, long-term and complex effort that requires presence at relevant municipal forums and involvement in municipal decision-making at its different levels.

**The following is a diagram of the consultation circles and the departments and agencies that take part in them:**



Forum Participants	CEOs of Tourism Companies	Metro Area Cities	Tourist Destination Cities	Municipal “Small Circles”	Roundtables & Stakeholders
Tel Aviv Global & Tourism Tourism Director	V	V	V	V	V
Tel Aviv Global & Tourism Staff				V	V
CEOs of Companies	V				
City Hall Staff		V	V	V	
Tourism Directors from Other Cities		V	V		
Ministry of Tourism	V	V	V	V	V







🕒 8AM

Coffee & yoga  
by the beach

🕒 9AM

Your convention starts

🕒 7PM

Sunset concert  
at ancient Jaffa

🕒 8PM

Rooftop dinner

🕒 5PM

Espresso seminar  
at the market

🕒 10PM

Night visit to the  
museum

🕒 12AM

Drinks on the  
beach

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