Seminar on Tourism Sustainability and Local Agenda 21 in Tourism Destinations

and

Workshop on Sustainability Indicators for Tourism Destinations

Jeddah, Saudi Arabia

18-22 February 2006

FINAL REPORT
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Acknowledgements

More than 120 participants from 13 Arab countries gathered at this educational Seminar and training Workshop on sustainable tourism policies, instruments and techniques. The case studies presented from the participating countries, as well as the plenary debates and working group sessions provided an excellent opportunity for the exchange of experiences developed in the Middle East and North African regions in the field of sustainable development of tourism.

The World Tourism Organization would like to thank the Government of Saudi Arabia and its Supreme Commission for Tourism, the Province of Mecca, the Governorate and Municipality of Jeddah and the sub-Municipality of Obhur for providing excellent facilities for the Seminar and Workshop, as well as for the assistance in the research for the Jeddah case study. UNWTO would like to express its gratitude to the Arab Tourism Organization for supporting the event through hosting the opening reception and dinner. UNWTO would also like to thank the speakers, moderators and participants of the Seminar and Workshop, who actively contributed to the sessions and debates.

The list of participants and resource persons for the Workshop is attached as Annex G.

The Seminar Report was prepared by Dr. Richard Denman, UNWTO Consultant, and the Workshop Report was written by Dr. Ted Manning, UNWTO Lead Expert on Sustainable Tourism Indicators. The overall report was edited by Mr. Gabor Vereczi, Programme Officer at the Sustainable Development of Tourism Department of UNWTO.

The Seminar Report is based on the presentations delivered by the UNWTO experts and by representatives of national tourism authorities in the countries of the Middle East and North African Regions. The Workshop Report is the product of a case study for Jeddah, Saudi Arabia, including on-site research and interviews, review of information and visits to specific sites and attractions in Jeddah, as well as the results of the working group discussions.

Technical visit in Obhur Creek, Jeddah. A new resort development area
Part 1: Report of the Seminar on Tourism Sustainability and Local Agenda 21 in Tourism Destinations

1.1. Introduction

This is the Report of a Seminar organised by the World Tourism Organization in conjunction with the Supreme Commission for Tourism of the Kingdom of Saudi Arabia.

The subject of the seminar, which was held at The Westin Hotel, Jeddah on 19 February 2006, was: Tourism sustainability and Local Agenda 21 in tourism destinations.

The seminar was attended by some 120 persons. Besides Saudi Arabia, delegates came from Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Mauritania, Morocco, Oman, Qatar, Sudan, and Tunisia. The Arab Tourism Organization was represented and there were a number of official guests from a range of Ministries and organisations within Saudi Arabia.

Following the seminar a three-day workshop was held on sustainable tourism indicators. This is the subject of Part 2 of this Report.

Background

Tourism accounts for around 10% of the world’s economic activity and has become one of the main generators of employment. It has a major impact on natural and built environments and on the wellbeing and culture of host populations. These effects can be positive or negative, depending on how tourism is developed and managed.

At the same time, the concept of sustainable development has become widely accepted as the way to a better, more humane and socially responsible future. There is a growing belief that tourism can play a significant role in sustainable development. The World Tourism Organization, in its new capacity as Specialised Agency of the United Nations, wishes to encourage all countries to ensure that their policies and actions for the development and management of tourism fully embrace the principles of sustainability.

Local Agenda 21 is a special mandate given to local governments, following the Earth Summit in Rio de Janeiro in 1992, as a way to move towards sustainable development. The Local Agenda 21 approach allows each community to set its own development in a sustainable manner. Traditionally, tourism development has depended on initiatives taken by the private sector. In many countries local authorities have not been closely involved in tourism and have little experience of its planning, development and management. In recent years this has been changing, and the responsibility of tourism development has lain more and more with local authorities, as governance structures have become more decentralized. The Local Agenda 21 approach provides a framework for local authorities to work with other stakeholders towards an agreed, sustainable future for tourism in local destinations that takes account of the needs and wishes of local communities and the environment.
Objectives

The objective of the seminar were:

- To generate awareness among national and local authorities, other relevant agencies and tourism businesses, of the importance of developing tourism in a sustainable manner.
- To examine what is really meant by sustainable tourism and the policy implications of this.
- To identify a range of tools that can be used to influence the development and management of tourism and make it more sustainable.
- To consider the special circumstances and opportunities of the Arab nations in pursuing sustainable tourism.
- To understand more about the Local Agenda 21 approach and how it has been applied.
- To share practical experiences at a national and local level across the countries of the Middle East and North Africa.

1.2. Summary of presentations and discussions

Opening session

Following a welcome in the name of His Royal Highness King Abdullah and a recital from the Holy Quran, the Seminar was opened by the Supreme Commission for Tourism and the World Tourism Organization.

Dr. Khalid Ibrahim Al-Dakhil, Assistant Secretary General, Supreme Commission for Tourism, Saudi Arabia welcomed delegates to Jeddah. He outlined the programme and expectations from the seminar, and underlined the importance of the forthcoming workshop and of the relationship between the UNWTO and the Supreme Commission for Tourism (SCT). He explained that the SCT had developed a strategy for tourism and an action plan to implement the objectives and was working in cooperation with local authorities to stimulate development in the different parts of the kingdom. He transmitted the thanks of HRH Sultan bin Salman bin Abd-al-Aziz-al-Saud, Secretary General of the SCT, to the delegates for attending and to all those involved with arranging the events.

Mr. Amr Abdel-Ghaffar, Regional Representative for the Middle East, World Tourism Organization, conveyed the greetings of the Secretary General of UNWTO to the delegates. He described how tourism, like few other sectors of the economy, had shown sustained growth. In the Middle East it supports job opportunities related to a variety of livelihood options. In this region tourism has been growing at more than twice the global rate, partly due to the efforts taken in marketing and in improving infrastructure. This growth will continue. A clearly defined and comprehensive strategic framework, such as the one adopted by the Government of the Kingdom of Saudi Arabia in its master plan for tourism, must be formulated to ensure that economic benefits are maximized and widely shared by all stakeholders, especially local communities, and that the natural, social and cultural environment in which the industry operates is adequately protected and preserved. Governments should give guidelines
for all to follow, balancing the opportunities of today with the needs of the future. The seminar and workshop should provide a comprehensive blueprint for achieving well-planned sustainable tourism growth in the Middle East.

His Excellency Mr. Joseph Malwal Dong, Minister of Tourism and Wildlife, Sudan, emphasised the importance of tourism for the economy, society and environment of his country. Sudan is very rich in natural resources for tourism, including mountains, forests, the Red Sea coast and the great river Nile. Special areas for tourism in combination with wildlife preservation have been established. New roads and other infrastructure are being created. Tourism is a force for developing the economy and promoting peace. The Ministry hopes to complete a plan for the development of tourism in Sudan and seeks the assistance of international organisations to put Sudan on the global tourist map.

At the end of the session a documentary film about cultural tourism in Saudi Arabia was shown.

Session 1: Tourism and Sustainability

The session was moderated by Dr. Faisal Al-Mubarak, Assistant Deputy Secretary General, Strategic Planning and Monitoring, Supreme Commission for Tourism.

Mr. Eugenio Yunis, Head, Sustainable Development of Tourism, World Tourism Organization spoke about the current imperatives for the sustainable development of tourism. He said that the UNWTO puts concern for sustainability at the centre of its activities and referred to the many research reports and advisory publications that it has produced on this subject. He reminded delegates of the various declarations and resolutions by the UN and other bodies that have urged the use of tourism as a tool for sustainable development. The challenge is to make all tourism more sustainable, not just specific sectors. The stakeholders include tourism enterprises, host communities, environmentalists and tourists themselves, but governments have a key role to play in providing leadership as the industry is often very fragmented, sustainability relates to areas of public concern and governments hold the tools that can be used to make a difference. Mr Yunis went on to outline a set of overarching principles and approaches that should lie behind the development and implementation of policies for sustainable tourism, such as the need to take a holistic view, to plan for the long term, to equate sustainability and quality, to minimise risks, to respect limits and to adapt to changing conditions. Above all, without control tourism cannot contribute effectively to sustainable development.

Dr. Richard Denman, The Tourism Company, UK, and UNWTO expert outlined the key objectives, policies and tools for sustainable tourism. He referred to the recent publication by UNWTO and UNEP Making Tourism More Sustainable – a guide for policy makers. This has set out 12 aims for sustainable tourism that provide the basis for constructing policies: economic viability; local prosperity; employment quality; social equity; visitor fulfilment; local control; community wellbeing; cultural richness; physical integrity; biological diversity; resource efficiency and environmental purity. To achieve these aims, governments should work with a wide set of stakeholders to develop an agreed strategy and action plan for sustainable tourism. This should seek to influence the location and nature of tourism development, the operation of facilities and the
behaviour of tourists. Dr. Denman went on to describe the set of tools available to exert this influence, including regulations, economic instruments, voluntary instruments, supporting measures such as marketing and capacity building and the application of indicators to keep abreast of change. A number of examples from around the world were used to illustrate how these tools had been applied in practice.

Questions raised by delegates, following the presentations, centred on ways of bringing economic and conservation interests together and working for increased visitor fulfilment through better information and interpretation of a destination’s heritage.

**Session 2: Governance in tourism: the importance of decentralization**

The session was moderated by Dr. Waleed Kassab Al-Hemaidi, Assistant Deputy Secretary General, Tourism Sites Development, Supreme Commission for Tourism, Saudi Arabia.

Mr. Gabor Vereczi, Programme Officer, Sustainable Development of Tourism, World Tourism Organization spoke about sustainable tourism policies, strategies and plans at different levels of government. He pointed out that although countries vary in their degree of decentralisation, there is always a need for coordination between the different levels of government and between the functions of departments within them. Likewise, the public and private sectors should work together. It is particularly important to have strategies and plans for tourism at the local level, as this is often where problems of tourism impact exist and where solutions can be found. Mr. Vereczi underlined the complexity of tourism at a local level, the variety of stakeholders involved, and the range of functions that local authorities and new destination management organisations have to deliver. He mentioned a number of examples round the world where regional and local governments and community initiatives had been successful, supported by a national policy framework.

Case studies were presented from different countries in the Middle East:

Mrs. Abeer Ahmed Al Saheb, Director of Planning, Ministry of Tourism and Antiquities, Jordan, presented the national tourism policy framework and the decentralisation process of tourism development in Jordan. She showed how the national tourism development policy had provided a framework for local action, including linking tourism to wider local and urban development. A key approach stemming from this has been the encouragement of public-private partnerships, which are often in the driving seat in delivering action plans. Some interesting approaches have been taken in the Third Tourism Development Project, supported by the World Bank, targeted on five cities. This has shown that local governments can’t act alone – both national government resources and capacity should be involved as well as local communities. Partnerships have been based on a signed pact to demonstrate commitment. As well as physical and infrastructural issues of urban development, the project has embraced institutional and human resource development issues.
Dr. Mohamed Mahmoud Hassanein, General Manager, Tourism Development Authority, Egypt presented the Red Sea Sustainable Tourism Initiative in Egypt. This has brought together the Ministries of Tourism and Environment to tackle tourism development in an integrated way. There are five main parts to the initiative: promoting environmental best practice amongst enterprise; evaluating environmental impact – strengthening the EIA process; strengthening environmental monitoring, including putting management and rectification processes in place; building capacity of the stakeholders; and preparing land use management plans. The latter divided the coast up into zones based on the degree of environmental sensitivity and identified the level and type of development suitable for each.

Mr. Mouldi Mhedbi, Chief of Minister’s Cabinet, Ministry of Tourism and Handicraft, Tunisia made a presentation about tourism policies in his country. He explained that many of the approaches discussed had already been introduced in Tunisia and others were on the way. It is believed that new products and projects are needed in Tunisia. A key for quality is the level of training. Environmental standards have now been identified that go hand in hand with quality standards. They have identified various projects that balance economic aspects and profitability with environmental protection. Priorities include making cities more attractive and integrating rural and village products into the tourist offer. The use of new technology is particularly important for environmental management.

Mr. Moha Er-Rich, Project Director, Development and Investment Department, Ministry of Tourism, Morocco presented the strategy for the development of rural tourism in Morocco. He referred to the significant growth targets for tourism in Morocco and the number of new jobs that should be created. Much of the growth will happen in urban areas. However, a new concept is village tourism which will account for 10% of tourism in Morocco by 2010. Guidance has been given by governments on matters of construction and quality control within this sector. This has been based on careful diagnosis of the market. Product quality has addressed matters such as handicrafts and the training of guides. Village tourism has created jobs for the local communities, services, such as water supply and conservation of historical sites.

Dr. Khalid Abulgader Taher, Director of Provincial Liaison and Support Department, Supreme Commission for Tourism, Saudi Arabia spoke about tourism and local authorities in Saudi Arabia. He referred to the efforts of the SCT in turning theory into practice. The Kingdom has many assets that can be utilised, including numerous heritage sites, but also opportunities for various forms of tourism, such as sports and religious tourism. Importantly, the first line in the strategic plan for tourism is about balance and sustainability. The model involves a 20-year strategy and 5-year implementation plans. Local strategies have been developed that reflect this. Various tools have been used to influence the sustainability of tourism, including planning regulations and the development of quality control and licensing based on standards.

Dr. Akram Mousa, Director of Planning, Ministry of Tourism and Wildlife, Sudan spoke about the unique history and civilisation of Sudan. Tourism is seen as a tool for persuading local people to preserve their heritage, in that through this they can increase their income and quality of life. There are a number of key sites in the country with tourism potential and an imperative of preserving the heritage resource. He showed a video that illustrated some of Sudan’s main treasures.
Comments and questions from the floor included the need to relate visitors to local culture, and the importance of living as well as built heritage. The local community should decide how its wishes to portray itself to tourists. There was also discussion on mechanisms for charging and getting more out of visitor income. Further questions concerned the creation of the right legal frameworks and regulations to enable the private sector to manage and operate tourist sites while preserving them. This extended into a discussion of incentives to stimulate the right kind of investment. The importance of authenticity and preserving unique features was agreed upon – it was confirmed that this was a key requirement of village tourism in Morocco.

Session 3: Local Agenda 21 and tourism

The session was moderated by Dr Khalid Abulgader Taher, Director of Provincial Liaison and Support Department, Supreme Commission for Tourism, Saudi Arabia.

Mr. Wolfgang Teubner, Executive Director, International Council for Local Environmental Initiatives, had prepared a paper on implementing sustainable tourism at the local level, but was unable to attend due to other sudden commitments; therefore, his paper was presented by Mr Gabor Vereczi, UNWTO. This identified the fundamental principles of the Local Agenda 21 approach, namely that each local authority should enter into a dialogue with its citizens, local organisations and private enterprises. Through consultation and consensus-building, local authorities would learn from citizens and from local, civic, community, business and industrial organisations and acquire the information needed for formulating the best strategies. The process of consultation increases household awareness of sustainable development issues. The Local Agenda 21 action planning process involves 5 steps: status report; indicators; action planning/priority setting; political decision taking; and monitoring/evaluation. The paper confirmed the key role of municipalities in developing sustainable tourism.

Mr. Gabor Vereczi, Programme Officer, Sustainable Development of Tourism, UNWTO and Dr. Richard Denman, The Tourism Company, UK and UNWTO expert presented some examples of Local Agenda 21 (LA21) initiatives in the sphere of tourism from around the world. In Winchester, a historic cathedral city in the UK, the tourism policy was developed using a LA21 approach with regular consultation and feedback from local citizens. Key issues addressed were attracting more staying rather than day visitors, spreading the load of visitors in space and time, and improving the quality of the experience offered and so ensuring that the visitors, in turn, cared more for the environment. In Calvia, a Spanish Municipality on the Balearic Island of Majorca, suffering severe over-development, extensive community consultation and awareness campaigns led to a wide range of practical actions to improve the environment and the quality of life of residents. These included the removal of buildings and opening up of green space, energy saving measures, restoration of heritage sites, waste control measures and restoring water quality. An observatory was established to monitor results and the city has won various awards for its approach. In Mexico the Agenda 21 for Tourism Destinations provides a framework and tool devised by central government that is implemented in a wide range of local destinations. It is based on a standard set of indicators of tourism impact. A simple green, yellow and red colour coding is used to...
show which factors are in order, which require preventative measures to be kept in check and which need serious action to address the situation.

**Mrs. Abeer Ahmed Al Saheb, Director of Planning and Mr. Khaled Omar Husein Al Shboul, Director of Jerash Tourism Directorate, Ministry of Tourism and Antiquities, Jordan** presented a case study on the local development of tourism in Jerash. This is an important historical city in Jordan. However, poor management of the main heritage site, lack of integration with the planning of the city as a whole, and economic stagnation had led to considerable degradation of the environment. The capacity of the municipality to deal with it was low. A comprehensive plan to tackle the situation has been based on a combination of regulations, infrastructure investment and physical measures, such as traffic management. A key feature has been creating partnerships with the private sector and local community, thereby creating a sense of ownership. Cultural heritage preservation has been facilitated through the establishment of a heritage fund that contributes to the cost of restoration of private properties.

Questions from the delegates concerned a number of practical issues. These included: the close relationship between the strategic planning and branding of a destination; the importance of incentives to preserve architectural heritage; and the mechanisms for successfully introducing certification of environmental quality, such as the Blue Flag scheme for beaches, which requires the use of assessors who are perceived to be objective and not influenced by government.

### 1.3. Conclusions and Recommendations

**Mr. Eugenio Yunis, Head, Sustainable Development of Tourism, UNWTO** presented a set of conclusions from the seminar.

1. There is evidence of a continued growth and of growing economic importance of tourism in the Middle East and North African regions, which calls for enhanced policies and planning in order both to raise the sustainability of tourism and to increase the contribution of tourism to the overall sustainable development of societies.

2. Sustainable tourism is now widely recognised as the way forward. Various UN/International statements in the last five to ten years support the sustainable development of tourism.

3. There is a need for Governments to take the lead for many reasons, including their responsibility for many of the resources on which tourism is based. Governments have a key role to lead a participatory process with all stakeholders including the private sector, the local communities, NGOs and other relevant actors.

4. The presentations made during the seminar clearly demonstrate that the sustainability agenda is very relevant to the countries of the Middle East and North Africa. Many of your strategies and objectives are in line with this. It is also very clear that your countries have very fine natural and historic heritage attractions, but they are still not well enough known internationally. As you have shown, the conservation of this heritage is vital for tourism for the future. Many management challenges and solutions are common across the world. UNWTO can help in finding appropriate solutions for each country.
5. Although there are common challenges and possibly common solutions, we must retain local distinctiveness. In the presentation from Jordan we were told that they first tried to find out what was special and different about each of their historic cities. This is the right approach.

6. We must appreciate, however, that sustainable tourism is not just about conservation of the physical environment. Many of the issues we heard during the seminar concerned social and cultural impacts. There is an international tendency to focus increasingly on the socio-economic and cultural dimensions of development, balancing them with environmental factors, and this is very valid for the tourism sector as well.

7. A key message coming out from the presentations today has been the need for Governments, Non-Governmental bodies, the tourism industry and local people/community to work together. Local Agenda 21 can be a useful process for tackling tourism with a sustainable development approach, provided it is conceived as a participatory process. The case study of Jerash provides a good example of this.

8. One of the biggest challenges, reflected in a question from the floor, remains how to get the private sector engaged. There are few representatives of the private sector here today, for example, and we need to get them better involved in such training events as well.

9. A large number of examples of good practice have been given, from Tunisia, Morocco, Jordan and other countries in this region. One of the main benefits of the Seminar is the experience that can be gained from sharing our ideas and experiences. I would encourage you to continue to do this within this region, as well as pulling in more international examples. Again, UNWTO can help with the publication and dissemination of the results of this Seminar, as well as with technical assistance for the countries of the region.

10. As far as technical solutions are concerned, and what Governments can do, I would again draw you attention to the range of instruments presented this morning and included in our book “Making Tourism more Sustainable – A guide for policy makers” ranging from regulations and land use planning, to economic instruments, voluntary tools and support through capacity building and marketing. This book will be distributed to you on the CD-Rom, along with the presentations and other reference documents.
Part 2: Report of the Workshop on Sustainability Indicators for Tourism Destinations

2.1 Executive Summary of the Workshop

This report presents the results of the case study and associated workshop held in Jeddah, Saudi Arabia. The workshop used Jeddah and its special tourism areas (Obhur Creek, historic center of Old Jeddah) as a demonstration destination to provide participants with exercises on the use of sustainable indicators in a concrete case study. The workshops used a working group technique with the participation of a range of stakeholders in the region’s tourism and officials from tourism administrations from countries in the Middle East and North African regions. Through the exercises guided by the UNWTO experts, the working groups analysed the issues and solutions for sustainable tourism in Jeddah, and identified a set of indicators to monitor management and planning processes. It is expected that Jeddah will serve as a pilot destination for tourism destination monitoring and an indicators framework will be implemented in the follow up to the workshop, and based on its results. The experiences and models generated in Jeddah can serve as examples for other destinations in Saudi Arabia and in the Middle East and North African regions.

This study is based on several sources of information: background data, reports from various levels of government and other agencies, prior studies relating to the tourism sector of the region, interviews with selected officials on site, discussions in the workshops; and analysis of information acquired during the field study period. These data have been used to build the specific framework for indicators which can respond to the key issues for Jeddah.

The Jeddah study revealed that most of the WTO baseline indicators (see Annex E) were applicable to the study area, with those relating to planning and organization, control of tourists and of new development, and integration of future tourism into the social fabric of the nation being of prime interest.

The main impact of the workshops and study has been to bring together the key stakeholders concerned with the future of Jeddah and its tourism. The event was very timely to address the strategic planning of tourism, given that tourism is in a dynamic development phase in Saudi Arabia, where new institutions focusing on tourism have been created at the National level, the Provincial level and more locally in an ongoing decentralization process of tourism administrations. Sustainable tourism indicators will be key for the effective implementation of the recently established tourism strategies and master plans at the national and provincial levels. Saudi Arabia has always been one of the world’s most important destinations: for many centuries the Hajj has been the largest annual migration of tourists, concentrated in a very short period and focused on the religious site of Mecca,
some 70 Km inland from Jeddah. The workshop was designed to create a dialogue which will hopefully lead to cooperation in the creation of a sustainable future for Jeddah and its tourism; and to stimulate consideration of the potential social, cultural economic and environmental effects of tourism and different forms of tourism activity. It is hoped that ongoing monitoring of key trends and use of the indicators will be a continuing process for Jeddah and will be an important input into the new planning process. The key issues for Jeddah are identified below in a summary table, and elaborated in greater detail in the study.
2.2 Conclusions and recommendations for the implementation of destination monitoring programmes using sustainable tourism indicators

The definition of indicators, their calculation and reporting procedure and application in planning and management activities is a long-term process. The Jeddah case study and the workshop provided exercises to demonstrate the indicators definition and application process in a few days, and resulted in an initial analysis of the sustainability and risk management factors. The Jeddah workshop was a success in helping to identify the key issues which officials will need to consider, and some of the most important indicators which will support their ability to plan and manage the destination towards sustainability.

For the application of indicators in practice, there is a need for an effective follow up to this workshop, with a strong political will to further coordinate the implementation of a monitoring programme through indicators, ideally fully integrated into the ongoing planning and management of tourism.

The following recommendations and conclusions are the results of the case study, working group discussions, as well as the suggestions expressed in the final plenary sessions and in the workshop evaluation form:

Recommendations for Jeddah

1. The continuation of the work with indicators is key in the pilot destination of Jeddah, as the experiences generated in the implementation process can benefit other destinations seeking to implement similar processes. Jeddah can build strongly on the results of the workshop, and follow up with the implementation of a destination-monitoring programme, using sustainable tourism indicators and focusing on the key tourism sites of the City (like Obhur Sharm and the Old City).

2. The different organizations involved in tourism have available data for a number of issues, but coordination is needed to use better the information and avoid duplication. For the effective implementation of a destination monitoring programme, it is recommended to set up a Technical Task Force, with participants from the key stakeholder groups, such as the Jeddah Governorate, Municipal Tourism Office, Sub-Municipal Offices, SCT, PTO of Mecca, PERSGA, PME, Marine College, University, Chamber of Commerce, NGOs (like Save our Seas), tourism businesses, Saudi Arabian General Investment Authority, etc. For this purpose, each organization should designate a focal point, or contact person. It is important that all organizations and individuals to be involved in this task force are clear about the contributions expected of them and the time frames involved for actions. For this purpose, it is recommended to define clear terms of reference for this Technical Task Force. For the selection of participants in the Task Force, it is important to consider organizations that intervene in the planning and management processes, and can provide information on the tourism assets and factors affecting them.

3. It is recommended to organize a follow up forum or workshop involving the key stakeholder groups. This event can serve for the official presentation of the Workshop Report, establish the above-mentioned Task Force, and define an action plan for the implementation process.
4. It is advisable to **start with a smaller set of priority issues and indicators**, and develop monitoring capacities gradually. The **summary list of key issues and indicators** presented in the report following the recommendations can be a good basis for this purpose.

5. For an effective monitoring system, indicators must also correspond to the main objectives identified in the recently established **Jeddah Tourism Development Plan**, which can be **combined with the sustainability issues identified at the workshop**.

6. **Indicators could be immediately applied to the 2006 business plan of Jeddah.** If performance indicators are included in the business plan, and they are also linked with the identified sustainability issues, these measures can facilitate the evaluation of the plan in achieving the planned outputs. The Jeddah Governorate Tourism body of SCT can undertake this work, and design the business plan on an indicator basis.

7. The monitoring programme should be systemized through **establishing a regular procedure for data gathering, processing and reporting mechanisms**.

8. The coordination on data gathering and indicators use can be facilitated through **establishing a common database** where the different organizations can feed information and retrieve data. The networking of the Task Force can be facilitated through web-based communications (e.g. an email group, or notice board).

9. The Internet could be also used for **informing the wider public on the monitoring results and gather feedback** on their opinion/satisfaction about tourism. There is also a need to **provide information to tourists** on the cultural and environmental heritage of Jeddah, as well as on practical aspects on tourism facilities and programmes.

**Recommendations for Saudi Arabia**

1. It is recommended that the Supreme Commission for Tourism (SCT) **makes copies of the report widely available** for tourism officials and managers, and organizations in related fields at the different levels in Saudi Arabia.

2. **Jeddah will serve as a pilot destination in the longer term, by generating experiences in destination planning, management and monitoring**, for other regions of Saudi Arabia, and other countries. Therefore, the support of SCT for the above-mentioned follow up activities is key.

3. Based on the Jeddah experience, it is recommended that **SCT initiate similar workshop processes, investigations and monitoring programmes in a series of destinations in other regions of Saudi Arabia**. Different types of destinations (like cultural and natural heritage sites, urban destinations, mountain, desert and other coastal areas) can be considered for pilot projects, in order to generate experiences in a variety of settings. The UNWTO workshop and indicators methodology can be adapted to the specific conditions of the different destinations.

4. Based on the pilot projects, it is suggested that **SCT develops a National Programme for Tourism Destination Monitoring**, which could be well integrated into the Sustainable Tourism Development Plan, and its Phase 2 Action Plan for the 2003-2007 period. While there is a need to design indicators for the specific conditions and needs of each destination, there is possibility to **define a collective set of national indicators, responding to baseline issues common to most Saudi destinations**. These baseline indicators can be aggregated and used as part of a national reporting system. An
example for this can be the set of 12 baseline issues and some 25 baseline indicators defined in the UNWTO Indicators Guidebook (see Annex E), which were selected from some 500 indicators corresponding to around 50 sustainability issues detailed in the publication.

5. Considering the numerous new tourism development projects and zones identified in Saudi Arabia, it is advisable to integrate sustainability criteria and indicators in early stages of investment and infrastructure development processes, in order to prevent undesirable impacts of tourism development.

6. It was recognized at the workshop that currently there is a lack of trained technicians who are able to carry out data-gathering and monitoring processes, and there is a heavy reliance on external consultants for tourism planning processes. While the workshop was a great opportunity to train officials on indicator techniques, it is recommended to integrate these methodologies in the curricula and courses of Universities and other education institutions dealing with tourism. There is a special need to develop capacity of tourism organizations in social survey techniques and knowledge of social issues.

Recommendations for countries and destinations in the Middle East and North African region

1. In these regions there is a wide variety of tourism destinations, but they are common in their needs to apply systematic monitoring programmes and advanced techniques. The UNWTO workshop and indicators methodology can be replicated and adapted to other destinations, therefore the National Tourism Administrations of the countries of the Middle East and North Africa regions are recommended to initiate similar pilot projects at a series of destinations and conduct investigations towards establishing National Tourism Destination Monitoring Programmes. The suggestions above recommended for Jeddah and Saudi Arabia are very valid for other Arab countries as well, and the experience of the Jeddah workshop will serve efforts in other nations.

2. There has been a wide variety of case studies and experiences presented at the Seminar and Workshop, and in some of them indicators are already used for monitoring purposes, such as the in the case of the Red Sea Sustainable Tourism Initiative in Egypt, or in Jerash City, Jordan. Nevertheless, it has been recognized that the improvement of indicators application and monitoring techniques are vital to reinforce existing tourism planning and management processes, and the UNWTO indicators technique can be adapted in these cases.

3. It is recommended to explore the possibilities for developing a regional follow up programme for the application of indicators and monitoring techniques in destinations of Arab countries. In this effort, collaboration could be developed with regional organizations and projects, such as the Arab Tourism Organization, and the Regional Organisation for Conservation of the Environment of the Red Sea and Gulf of Aden (PERSGA).
Conclusions and considerations regarding further development of the UNWTO Indicators Programme

1. **UNWTO will ensure a wide distribution of the results of this seminar and workshop**, and will inform the countries of the region on new developments and good practices in this subject.

2. **UNWTO will examine, subject to funding being made available, the possibility for follow up activities at the pilot destination of Jeddah, particularly related to the provision of further technical expertise for the implementation of the workshop results. UNWTO can continue to take an active role in assisting SCT and planners and managers of Jeddah to gain access to methods, models and examples for the application of indicators and monitoring processes.**

3. **It is suggested that UNWTO explores the possibility of developing a regional follow up programme** to replicate the workshop methodology in a series of pilot destinations in other countries. Partnership with regional organizations, such as the Arab Tourism Organization and PERSGA could be established for such purpose. Follow up workshops could be organized with a train-the-trainers approach in order to develop the capacity of countries to upscale the application of these techniques in a wider range of destinations, aiming at developing destination-monitoring programmes at the national level.

The workshop provided an opportunity for all in attendance to discuss and experience the indicators development process and to meet others with similar problems. This effort could lead to future collaboration within the region toward the promotion of sustainable tourism. Participants also had the opportunity of using enhanced participatory techniques to address tourism planning processes. The recommendations above reflect the discussions on application and next steps, and recognize the opportunity for the sharing of information, which the participatory approach provided.
### 2.3. Priority Issues and Indicators for the pilot destination of Jeddah

<table>
<thead>
<tr>
<th>Issue</th>
<th>Components of the issue (those addressed in detailed discussions for training in the workshop shown in <strong>bold</strong>)</th>
<th>Priority Indicators</th>
</tr>
</thead>
</table>
| Local Satisfaction                   | • Inappropriate tourist behaviour affecting local values  
• Tradition as a barrier to tourism  
• Lack of awareness, understanding, of local population on tourism | • Percentage of residents with a specific opinion on the impact of tourism on them and their community (as per survey suggested in Annex A) |
| Effects of tourism on community      | • Local community participation                                                                          | • Number of persons (local, national, foreign) involved in tourism  
• Number of tourists per day in Jeddah (and in specific sites) (average and for peak day) |
| Access by community to public areas  | • Private ownership of key beach areas  
• Limited access to sandy beaches                                                                 | • % of beachfront which is public (also % of sandy beaches)                           |
| Gender and tourism                   | • Gender issues of visitation of attractions (unequal rules, where can women or families use services, visit attractions-e.g. entertainment parks)  
• Lack of clubs designed for women (e.g. fitness, spa) | • % women visitors who believe that they had good access to tourist facilities (compare to % men)  
• % potential foreign visitors who believe that Saudi Arabia (Jeddah) is a welcoming destination for female visitors) – possible survey in potential markets |
| Deterioration of old buildings in Jeddah | • Abandoned buildings  
• Graffiti and vandalism  
• Pressures to demolish buildings to construct new ones  
• Loss of historic character of unique area | • Number of historic buildings (% data according to condition, ownership, whether abandoned or not)  
• % of requests for demolition/restoration approved (annually)  
• Current use of old buildings (% with tourism use or access)  
• % visitors who believe that Old Jeddah has unique historic character |
| Community involvement and awareness  | • Lack of active participation of community in planning and management of tourism | • Degree to which the community is satisfied with the information it is receiving on tourism issues  
Survey questions on level of involvement and satisfaction |
| Tradition and tourism                | • Concern over limits of acceptable change and what type of tourism Jeddah wants | • Family situation of visitors (by purpose of visit)  
• Attitude of local residents to tourism/tourists (by locality, by age, gender)  
• % of residents who believe that tourists violate their traditions  
• % of visitors who think Jeddah is what they expected (before and after survey)  
• Willingness of visitors to come again (by demographics, reason for visit)  
• Level of sensitivity of tourists to key local values and traditions (focus survey)  
• % of tourists who agree they received good information on local sensitivities/traditions |
| Tourist satisfaction                 | • Tourists reaction to Jeddah and its assets are not well known – need to measure key reactions | • Level of satisfaction by visitors on exit questionnaire  
• Perception of value for money (also from the questionnaire) |
<table>
<thead>
<tr>
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<th>Priority Indicators</th>
</tr>
</thead>
</table>
| Public safety and security | - Growing concern re image and reality of security for all destinations | - Total number of crimes reported involving visitors (by type – e.g., robbery, assault, etc).  
- Number of visitors charged with crimes (by type per annum)  
- % of tourists (and potential visitors) who believe Jeddah to be a safe place to visit |
| Tourism seasonality | - Great variation in climate (very hot period)  
- Concentration in Hajj | - Tourist arrivals by month or quarter (distribution throughout the year)  
- Occupancy rates for licensed (official) accommodation by month (peak periods relative to low season) and % of all occupancy in peak quarter or month  
- Number and % of tourist industry jobs which are permanent or full-year (compared to temporary jobs)  
- Number of different sites visited in Jeddah/Makkah province during the visit |
| Community and Destination Economic Benefits | - Tourist sector requires government support for investment  
- Inadequate pricing policies, increasing prices, services overpriced, lack of budget options (low cost) for services (e.g. accommodation, parks) in high season  
- Capturing local benefits from tourism  
- Lack of small-scale tourism development | - Number of local people (by nationality and gender) employed in tourism  
- Average tourism wage relative to overall average wage  
- Number of tourism enterprises (% locally owned) |
| Employment | - Overall jobs, foreign workers, skill levels, retention | - Total number of persons employed in the tourism sector (by age, nationality)  
- % of employees qualified/certified |
| Competitiveness | - Quality of tourism  
- Positioning Jeddah in market  
- Value for money | - % of tourists who believe Jeddah to be good value for money (exit survey)  
- Average price paid per room day (by season, type of accommodation) |
| Protecting critical ecosystems | Filling of shorelines  
Lack of protected sites  
Overuse of key areas | - Number of protected sites (plus area and level of control/protection)  
- Intensity of use for key sites (number of boats per Km² in Obhur creek) |
| Construction on fragile shorelines | - Cutting and filling along the shore | - |
| Seawater quality | - Seawater quality in the creek and in small ponds, sewage | - Level of contamination of seawater and water in Obhur  
- Tourist perception of seawater quality (on exit questionnaire) |
| Sewage Treatment | - Most of Jeddah does not have sewage treatment. Many hotels have their own systems of varying effectiveness | - Percentage of Jeddah sewage which is treated  
- Percentage of tourism establishments on approved treatment systems. |
<p>| Solid waste | - Garbage along the shore, littering, illegal dumping (creating mosquitoes-health problems) | - Amount of garbage thrown away in beaches, corniche and other public areas (kg/tonne per day, week) (Quantity of waste collected from) |</p>
<table>
<thead>
<tr>
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<th>Priority Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Local attitude towards maintenance, cleanliness of urban areas</strong></td>
<td>Percentage of tourists who were bothered by excessive litter in the streets and tourist destinations (exit questionnaire)</td>
</tr>
<tr>
<td></td>
<td><strong>Management of safety in water-based activities (seadoos, boats)</strong></td>
<td>Intensity of use for key sites (number of tourists per Km² for key sites (Obhur creek))</td>
</tr>
<tr>
<td></td>
<td><strong>Land use planning – zoning and associated standards and regulations</strong></td>
<td>% of tourists who found key sites overcrowded (exit questionnaire)</td>
</tr>
<tr>
<td></td>
<td><strong>Traffic management, congestion, parking (impacting quality of life of locals)</strong></td>
<td>Existence of a land use planning process (and its application to tourism)</td>
</tr>
<tr>
<td></td>
<td><strong>Existence of a land use planning process (and its application to tourism)</strong></td>
<td>% of coastal zone subject to zoning control (e.g. density, design)</td>
</tr>
<tr>
<td></td>
<td><strong>Lack of master plan for tourism for Jeddah and complexity of procedures</strong></td>
<td>% building proposals receiving environmental review</td>
</tr>
<tr>
<td></td>
<td><strong>Lack of clarity of responsibility between agencies, coordination</strong></td>
<td>Number of charges for violations of zoning laws</td>
</tr>
<tr>
<td></td>
<td><strong>Lack of environmental management of tourism sites</strong></td>
<td></td>
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<tr>
<td></td>
<td><strong>Regulation and enforcement problems:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Lack of compliance with land use and shoreline regulations</strong></td>
<td></td>
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<tr>
<td></td>
<td><strong>Insufficient development control</strong></td>
<td></td>
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<tr>
<td></td>
<td><strong>Lack of a comprehensive site-management plan for Obhur creek</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Lack of social activities, programmes for visitors, lack of tour operators and packages, variety of products</strong></td>
<td>Number of different attractions in or near Jeddah</td>
</tr>
<tr>
<td></td>
<td><strong>Lack of tourist information (guides, maps)</strong></td>
<td>Satisfaction with variety by tourists (exit questionnaire)</td>
</tr>
<tr>
<td></td>
<td><strong>Need investment in accommodation and entertainment</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Lack of marketing and promotion strategy and activities Need more international tourists (destination not ready yet)</strong></td>
<td>Tourist satisfaction (as per exit questionnaire)</td>
</tr>
<tr>
<td></td>
<td><strong>Safety and security</strong></td>
<td>% of tourists who have a positive image of Jeddah(exit questionnaire)</td>
</tr>
<tr>
<td></td>
<td><strong>Inadequate quality of services</strong></td>
<td>% of tourists who would recommend Jeddah to their friends (exit Q) (sort by nationality, age, gender, reason for visit)</td>
</tr>
</tbody>
</table>

*Each of these issue areas and indicators are detailed in part 2.6.5 of the Report.*
2.4. Introduction on the use of sustainable tourism indicators

UNWTO has been conducting research and capacity building activities in the field of sustainable tourism indicators for more than a decade. The essence of the indicators program of UNWTO is risk management and provision of critical information to those in planning and management so that they can anticipate and prevent unacceptable and unsustainable outcomes. Better information through indicators provides the ability to define risks to key assets, to communities, to the values most important to the communities and tourists, and the levels of preparedness of destinations in the event of problems or as a means to anticipate and prevent them. The UNWTO Guidebook on Indicators of Sustainable Development for Tourism Destinations (2004) is designed to help identify key issues and the indicators which can help managers respond effectively to them and sustain what makes a destination viable and attractive. In the case of Jeddah, the information needs to encompass both the management of the heavily seasonal current travel patterns, and the information needed to support good decisions regarding the future types and quantities of tourism for the city.

Indicators are defined as “measures of the existence or severity of current issues, signals of upcoming situations or problems, measures of risk and potential need for action, and means to identify and measure the results of our actions. Indicators are information sets which are formally selected to be used on a regular basis to measure changes that are of importance for tourism development or management.” (UNWTO Guidebook, 2004 p8). Used properly, indicators can become key management tools – performance measures which supply essential information both to the managers and to all of the stakeholders in tourism. Good indicators can provide in-time information to deal with pressing issues and to help guide the sustainable development of a destination.

At each tourism destination there exist certain data and information that can serve as sustainability indicators if their relevance is understood. Tourism professionals work regularly with indicators. The most commonly used and understood indicators are of economic aspects like tourism revenues and expenditures, tourism base line data and statistics like tourist arrivals, overnights spent, accommodation capacities, etc. These are reference points for business decisions and for ongoing management of the industry. There are many existing indicators that can be used as sustainability indicators, when their relevance to sustainability issues is understood. For example, the number of tourists, a baseline figure, can be considered a sustainability indicator, when it is related to infrastructure capacity at a certain site (e.g. the airport) or to measure tourist response to efforts to change use patterns. As part of a carrying capacity assessment or estimate of limits to acceptable change, tourism numbers (in particular peak use figures) can be related to the sustainable use of natural resources (e.g., water consumption per tourist) or used to indicate potential level of stress on the system (e.g. density of boats on the Obbur Sharm in Jeddah, traffic levels on the Corniche). When these same tourist numbers are compared with the number of local residents, (both for the entire destination and at particular sites) a ratio is formed that can serve as an indicator of potential social stress - one indicator of the socio-cultural sustainability of tourism. The objective of the indicators process is to reduce future risks to the tourism industry and to destinations like Jeddah, with special attention to the sustainability of the key assets and the values central to the local population.
Some of the benefits from good definition and use of indicators can include:

- better decision-making - lowering risks or costs
- identification of emerging issues - allowing prevention
- identification of impacts - allowing corrective action when needed
- performance measurement of the implementation of plans and management activities – evaluating progress in the sustainable development of tourism
- reduced risk of planning mistakes - identifying limits and opportunities
- greater accountability - credible information for the public and other stakeholders of tourism fosters accountability for its wise use in decision-making
- constant monitoring can lead to continuous improvement - building solutions into management

Indicators can also be inputs to company level or site level decision-making and planning processes. Some indicators may measure overall trends, for example, tourism in the region or in Mecca province as a whole. Sustainability indicators for a destination (e.g., Jeddah) or for specific sites within a destination (e.g., the Sharm, the Old City) are often based on data collected at a more specific level from key tourist use sites, operators of attractions such as the rental of jet-skis or boats and specific tourist attractions (e.g., the Marinas or Naseef House) and individual establishments providing tourism services, among others. Destination level indicators are essential inputs for regional level planning processes that further cumulate information which can support the development of indicators at the Provincial or even National level.
The box below, extracted from the UNWTO Indicators Guidebook, explains the use of indicators in destinations at different stages of the planning process.

**What if there is no Plan? What if there is one?**

The sustainable development of tourism destinations requires a sound planning process, as well as continuous management of the key elements that support tourism and its destinations. (e.g., maintenance of assets, involvement of the community, involvement of tourism in the planning process for the destination) Indicators are an intrinsic component of the planning process.

**Where no tourism plan currently exists**

- Where no plan exists that includes tourism, the procedure by which indicators are developed is analogous to the first step in plan development. Both involve the identification of the key assets and key values associated with the destination. Both normally involve the assessment of the actual problems, current or potential impacts or risks associated with development, as well as documentation of the major current or expected trends or events which may affect these.
- An indicators study can be the catalyst for development of a formal plan or planning process, beginning with identification of potential issues (pollution, loss of access, impacts of development in other sectors). Response will likely require some form of plan or management procedure.
- An indicators exercise can help identify key elements that must be included in plans, such as the resource base for the industry, or risks to the assets or product.
- Performance indicators can be defined relative to the specific goals and targets of the plan. Each specific development project can integrate performance indicators in order to measure the success of management actions in the implementation phase. This information will serve to decide whether corrective actions are needed and also can provide a tool for continuous monitoring.
- Indicators defined to analyse actual environmental and socio-economic conditions at the initial phase of the planning process can became performance indicators in the implementation phase. For example, indicators determining the actual state of seawater quality at beaches or actual levels of community income from tourism will serve later on to measure achievement relative to these goals.

**Where there is a tourism plan**

- An indicators study can assist in evaluation of current regional or tourism plans to determine whether all of the key risks to sustainable development of tourism are covered.
- The indicator identification exercise can be applied to already defined problems, issues and objectives to improve the provision of accurate data and information where needed.
- Where no monitoring system or performance measures are included in an existing plan, the indicators development process can assist in identifying and clarifying key areas where performance measures are needed.
- Indicators discussions can often stimulate greater precision in redefining goals and targets.

**Indicators as tools for public information and education**

- Within and outside of the planning process, indicators are a form of education tool - helping to highlight key concerns for public information
- The results of indicators use may well foster demands for action - and lead to public support for more inclusive planning procedures to protect and sustain the key values in any destination.
2.5. The Workshop Methodology

The principal approach of the workshop is to use a case study destination and demonstrate the identification of priority issues, responses and indicators through a participatory process. A working group technique is applied involving local stakeholders, national and international participants, in order to lead them through a series of practical exercises, using different forms and templates (see Annexes), through the guidance of UNWTO experts. The workshop had a double purpose:

1. To provide training for tourism officials and experts, through practical exercises in a case study situation
2. To initiate a stakeholder consultation and participatory process at the pilot destination, in order to develop a tourism management and monitoring programme for the long term

The workshop methodology is designed to be replicated in other destinations for the purposes of training and to development destination monitoring programmes.

The UNWTO Indicators Guidebook (2004) in its Part Two suggests a detailed procedure for the definition and application of indicators. This methodology for indicators development can be defined as a phased approach which will result in operational indicators for a destination, ideally integrated with the ongoing planning and management process and reinforcing its effectiveness. The UNWTO indicators development and implementation process has twelve phases, each logically leading to the next. (From the UNWTO Guidebook). This is normally a lengthy and on-going process that cannot be resolved in a 3-day workshop; therefore the focus of the workshop exercises was on steps 1-6 (marked with italics), based on a preliminary study of the case study destination (Jeddah):

Research and Organization

1. Definition/delineation of the destination.
2. Use of participatory processes.
3. Identification of tourism assets and risks.
4. Long-term vision for a destination.

Indicators Development

5. Selection of priority issues
6. Identification of desired indicators.
7. Inventory of data sources.
8. Selection procedures.

Implementation

10. Data collection and analysis.
11. Accountability, communication and reporting.
12. Monitoring and evaluation of indicators application.

The workshop was preceded with an initial research and on-site interviews with local stakeholders by UNWTO Experts to prepare an initial analysis of the case study destination. Several meetings and visits were done prior to the workshop, designed to address some of the earlier elements in the process – to begin to gather information pertinent to the study and to provide the workshop organizers and local participants with knowledge of key issues and areas of concern. This stage was also used to help identify key local stakeholders and to encourage their participation in the workshop. The familiarization of participants to the case
study destinations was facilitated through presentations by local stakeholders and through technical site visits.

In the workshop itself the discussion focused on the elements of this process (*steps 3-6 in the UNWTO procedure*), which identify key issues and select and evaluate indicators which will be most important to the destination. In the Jeddah case, the focus was placed on indicators which could address the issues arising increased density of tourism in the coastal zone, the protection of key cultural assets and traditions, and the challenge of accommodating demands associated with new types of tourism. In addition to the work to define key indicators, participants, both from Jeddah and from other destinations in Saudi Arabia and the Arab world, were encouraged to consider the steps necessary to carry out the remaining phases based on their work – to actually implement an indicators program and to take key indicators through to the point where they are systematically monitored and used to support decisions and to showcase performance.

**Identification of key issues and responses for Jeddah**

In the first working group session of the workshop the focus was on defining key issues and responses for Jeddah, followed by a prioritization process which was used to select the issue areas which were of greatest interest to the participants.

The selection of key issues was based on a voting system where all participated. Each participant was given eight votes which could be applied to any issue – either concentrated on one which the participant felt was overwhelmingly important or distributed across as many as eight different issues; the list is a summary of what was seen collectively as the highest priorities. This guided the selection of which issue areas to discuss in more detail in
the following sessions and to use for the hands-on training in how to select and evaluate indicators.

Identification of Indicators

A long list of potential indicators was identified by the working groups which could respond directly to the most important issues.

Then, each of the possible indicators was systematically reviewed relative to the following criteria:

1) **Relevance** – is it important to have this information and who will use it? Who and how will use this information for decision-making. Does it really help to understand or respond to the issue? If the answer was no, the potential indicator was set aside.

2) **Feasibility** – is it reasonable and practical to obtain the information to support the indicator, considering technical capacities and costs of data gathering and processing. If the answer was yes, (that is, upon initial scan it seemed likely that the information was available from an existing source or could be reasonably easily generated) the indicator was retained for further examination.

3) **Means to use the indicator** *(includes concerns for credibility and clarity)* where does the data come from – is it likely to be believed or is the source questionable? Does it need further work? How will the indicator be portrayed so that it will be easy to understand? Will it need additional manipulation to be a good indicator?

4) **Benchmarking or comparability** – are there standards or benchmarks which can be used to compare this indicator with other destinations or sites, if not, will it be possible to use it to show change over time in one destination?

“Voting” for the priority issues in the working group, using dot stickers.
The first two criteria – relevance and feasibility were treated as critical while the other criteria helped to stimulate initial deliberation on how the indicator will actually be collected, used and understood. At the same time, the discussion of the indicators focused on both how the indicator could be used to plan and manage long-term sustainability, and which of the indicators would be of primary importance in the context of shorter term action.

The workshop participants were also involved in the elaboration of one indicator (availability of tourist information) as an example of the implementation process. Using the Indicator Development Worksheet (see Annex D) each step was addressed. This exercise demonstrated the key questions, the need for coordination and cooperation, and the potential obstacles and opportunities related to the use and sharing of existing data.

Worksheets used for the discussions on how to put selected indicators in place and next steps required for key indicators are contained in Annexes C and D.

**Discussions on follow up actions:**
The final part of the workshop session was designed to stimulate follow up action for the actual establishment of an indicators program and its use in the planning and management process. This is very timely for Obhur and for Jeddah and for Saudi Arabia as at all scales, they are at in a new planning process for tourism. Possibilities of the application of the workshop methodology and indicators in other Arab countries and destinations was also discussed in final plenary session.

Please see Annex F for the detailed Workshop Programme.
2.6 Indicators application in the pilot destination of Jeddah, Saudi Arabia

2.6.1 Delimitation of the study area and basic characteristics

Jeddah is located on the Red Sea coast of Saudi Arabia. A modern city of nearly three million, the city is the principal Red Sea port, the main access point for visitors to Mecca, and the leading commercial city for Saudi Arabia. Created as the port city for Mecca, Jeddah has a fascinating history associated with travel and tourism, with records showing early tourist management associated with provision of access to foreign visitors for the Hajj. The old city still has some of the original buildings and remnants of city walls. The new city extends northward along a corniche to the Obhur Sharm, providing many visual and recreational opportunities. The city is rapidly growing and new buildings, many with exceptional architecture can be seen widely.

For the purposes of this study, the broad focus is defined as the Governorate of Jeddah. While there is a more specific focus on specific sites within Jeddah – notably the tourist hot spots of Obhur creek, the Corniche, and the Old City, most tourists tend to visit more than one of these sites and use the infrastructure of the entire city. As well it is necessary to consider that a majority of tourists to Jeddah from other countries also visit the nearby city of Mecca, and that any changes in tourism to Mecca will significantly impact Jeddah.

The predominant sources of tourists visiting Jeddah are of two types: visitors to Mecca for the Hajj and Umrah, and domestic tourists seeking recreation and proximity to the sea. The travel infrastructure of Jeddah has always been linked closely to the needs of travellers to Mecca, most who use Jeddah as the port of entry to the holy city. The present airport infrastructure and ground travel facilities are designed to accommodate the more than four million hajj visitors, whose impact is concentrated over less than two weeks each year. Jeddah is also Saudi Arabia’s principal Red Sea port, and transfer point for a majority of the Hajj travellers who arrive by sea.
The key tourism assets of Jeddah and the region can be summarized as follows:

- Good climate in winter (can be hot in other seasons)
- The Red Sea
- Diverse reefs with colourful fish populations
- The Old City of Jeddah with nearly 500 examples of buildings with traditional Jeddah architecture and a rich Souk (market area).
- Protected port
- A corniche along most of the seashore with good public access to a range of attractions
- The Obhur Sharm – an inlet with considerable tourism development and sheltered water.
- Proximity to Mecca

Development has also added:

- Increasing variety of built attractions – theme parks, outdoor art, cultural events
- Easy transport access to major cities worldwide as a transportation node for the region
- Good land transport to other Saudi centres
- Excellent services for the public and available for tourists

The image of current Jeddah is of a large modern city which is considered as a gateway to Saudi Arabia and to Mecca. It is necessary to view the Hajj separately from other visits. While the Hajj brings about four million visitors, most of whom pass through Jeddah, tourism for the rest of the year is more limited. For domestic tourists, most view Jeddah as a place to visit the sea and to shop, as well as a place to stay while visiting Mecca for the Umrah (a religious visit outside the Hajj period). For foreign visitors, the image of Jeddah is not well known, and its attractions have not received much attention so far. Further, limitations on access to tourist visas have prevented widespread independent travel to Saudi Arabia, and many of its cultural and natural treasures have escaped the attention of most tourists.
The creation of the Supreme Commission on Tourism, the establishment of tourism planning capacity at the Mecca Province, Jeddah Governorate and Municipality and in Obhur Sub-municipality show growing interest in the planning and management of tourism in Saudi Arabia and in Jeddah. At the same time, discussions are under way regarding the easing of access to tourism visas, and the issues of planning and managing a new form of tourism.

For Jeddah the challenge will be to maintain the assets listed above while accommodating, each year, greater numbers of tourists, some of whom may differ in their motivations and expectations from past visitors. Much of the key infrastructure is in place, and is not overstressed outside the Hajj period. The pace of development is quick, and may be bringing stresses to some of the sites, to local water and road infrastructure, and to the ability of government agencies to respond effectively – to anticipate and act to prevent non-sustainable forms of development. The pattern of growth has been one of building and hardening the coast, in some cases altering the shore significantly. Directed discussion on the desired patterns, the social, economic or environmental limits, and means to control tourism are just beginning, while construction cranes and dredges are already at work along the Corniche and in the Sharm, and pressures grow for redevelopment in and around the old city.
2.6.2 Jeddah Fact sheet

**Location:** Jeddah is a city of nearly 3 million, located on the Red Sea Coast of Saudi Arabia. A major commercial and transportation centre, Jeddah is also the principal port and airport for travel to Mecca. The city has nearly forty kilometres of coastline, over half of which has been made public access through the construction of a corniche, providing a road, walkways and attractions along most of the coast.

**History:** Jeddah was developed initially as the port for Mecca. It has seen significant growth in the past 40 years as the major Red Sea port and commercial centre for Saudi Arabia.

**Climate:** The climate of the region is very hot and humid in summer, and drier and temperate in the winter season. High temperatures in excess of 40 degrees Celsius occur in July and August – which is also a peak season for tourism, particularly domestic tourism. The region receives little precipitation, although very high humidity is often experienced in the summer season.

**Flora and Fauna:** The area around Jeddah is semi-desert, although irrigated areas are productive. The flora and fauna of greatest significance are in the Sea – with extensive areas of sea grass and coral reefs, and a very rich range and density of sea life.

**Local governance:** Planning occurs at several distinct levels:
- National – with responsibility for overall policies
- Provincial level – with new strategies for tourism development in preparation for each province.
- At the level of the Municipality of Jeddah for major infrastructure
- At the level of the local sub-municipality for local infrastructure and site planning (e.g Obhur Sharm) It should be noted that the tourism mandate relates to all these levels, and that tourism planning necessarily involves all levels.

**Attractions** The key attractions of Jeddah include:
- The corniche with its parks, ponds, art and entertainment facilities
- Obhur sharm with its resorts, marinas and water sports
- The Old City, with its examples of original Jeddah architecture, variety of market shops
- Shopping – with several of the largest modern shopping centres in the region

**Nearby Attractions:** Muslim Tourists to Jeddah normally also visit Mecca and may also visit Medina, the most holy cities of Islam. Offshore reefs are also accessible for diving, and longer distance tours to offshore islands originate in Jeddah.

**Tourism Accommodation:** Jeddah has a wide range of accommodation ranging from five star international hotels to many more modest rest houses, many of which serve seasonal demand, particularly for the Hajj.

**Tourists:** Number overnight guest arrivals. Jeddah receives around 10 million domestic overnight visitors and around 2.5 million international tourists, which makes it one of countries principal destinations. There is a high proportion of domestic visitors (57%) that come with the main purpose being ‘holiday and leisure’, together with the 19% that come for the purpose of ‘visiting friends and relatives’ (source: Jeddah Tourism Development Plan, 2005).
Tourism statistics related to Umrah and Hajj:

The number of International tourists for Umrah has been growing over the last five years with a healthy growth rate of 13.6% while international Hajj visitors grew by only 3.5%.

<table>
<thead>
<tr>
<th>Year</th>
<th>International Umrah Arrival (Million)</th>
<th>International Hajj Arrival (Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>1.76</td>
<td>1.36</td>
</tr>
<tr>
<td>2001</td>
<td>1.82</td>
<td>1.35</td>
</tr>
<tr>
<td>2002</td>
<td>2.16</td>
<td>1.43</td>
</tr>
<tr>
<td>2003</td>
<td>2.25</td>
<td>1.41</td>
</tr>
<tr>
<td>2004</td>
<td>2.85</td>
<td>1.53</td>
</tr>
<tr>
<td>2005</td>
<td>3.25</td>
<td>1.60</td>
</tr>
</tbody>
</table>

The arrivals follow a highly seasonal pattern. Usually Hajj movements occur during a 10-week period of the year, but it peaks during the 3rd to the 7th week of the period.

Umrah is seasonal too, although it occurs during a 8-month period:
- 38% of Umrah arrivals occur during the month of Ramadan.
- 20% during the month of Shaban.
- 10% each during the months of Rajab, Jamad 1st, and Jamad 2nd.
- and only 12% of the arrivals occur during the other three months.

Jeddah does not benefit widely from this flow, given that Umrah and Hajj visitors go directly to Makkah and Median, although they use the Jeddah airport and sea port.
2.6.3 SWOT analysis for tourism in Jeddah

The main issues for Jeddah relate to the management of growing tourist numbers, management of the relationship between traditional practice and tourist behaviour and expectations, provision of infrastructure for peak tourist flows (the Hajj), regulation of building, provision of sufficient services to the tourists and local day visitors, and protection of the key assets of the destination. As well, there are concerns related to the participation in benefits, the focus of marketing, and the control of the impacts of increasing numbers, so that growing number of tourists continue to have enjoyable experiences and the destination benefits from the tourism.

The following table contains the main Strengths, Weaknesses, Opportunities and Threats (SWOT) for tourism in Jeddah. While the workshop exercise was directed to consider primarily issues and potential solutions, the SWOT approach is used below to synthesize the results of the discussions and analysis of other materials obtained in the study.

**SWOT analysis for Jeddah (summary table)**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Seaside location</td>
<td>• Lack of a wide range of tourism products</td>
</tr>
<tr>
<td>• Location near centre of Muslim culture</td>
<td>• Lack of marketing information and promotional materials</td>
</tr>
<tr>
<td>• Good climate in winter</td>
<td>• Difficulty to obtain entry visas</td>
</tr>
<tr>
<td>• Well developed infrastructure</td>
<td>• Uncontrolled development of some parts of the shore zone</td>
</tr>
<tr>
<td>• Good direct access to foreign markets</td>
<td>• Lack of strong integrated planning and management, policy and planning to control and direct growth</td>
</tr>
<tr>
<td>• Good international links</td>
<td>• Weak site plan control, environmental review and enforcement for protection of natural assets.</td>
</tr>
<tr>
<td>• Good hotel and restaurant infrastructure</td>
<td>• Overcrowding, noise and waste issues in key high-density locations</td>
</tr>
<tr>
<td>• Outstanding public places with extensive public art</td>
<td>• Restrictions placed on female travellers re dress and mobility may deter female visitors</td>
</tr>
<tr>
<td>• The Corniche – a beautiful linear public space providing scenic and recreation opportunities along most of the coast</td>
<td>• Extreme seasonality of visits associated with the Hajj</td>
</tr>
<tr>
<td>• Old City with traditional buildings</td>
<td></td>
</tr>
<tr>
<td>• Good shopping facilities</td>
<td></td>
</tr>
<tr>
<td>• Excellent range of good quality restaurants with good variety</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Increasing demand based on growing domestic holiday market and on interest of international tourists to visit exotic localities</td>
<td>• Regional unrest which may affect the international market</td>
</tr>
<tr>
<td></td>
<td>• Lack of environmental monitoring as early warning system for reef damage</td>
</tr>
</tbody>
</table>
• Packaging interest tourism to better utilize a broader range of natural and cultural assets
• Selective marketing of new products to attract tourists compatible with Saudi cultural sensitivities
• Interest from large-scale investors or water contamination
• Lack of development coordination and control for private land holdings
• Risk of too rapid or excessive growth
• Risk of social conflict between tourist and local values

Viewpoint in the Corniche Area
2.6.4 Key sustainability issues and responses

This section contains the synthesized list of sustainability issues, as well as potential response on solutions, identified through discussions in the three working groups of the workshop. The issues have been grouped to categories, such as environmental, management, planning, socio-cultural and economic issues.

After developing a long list of issues and responses, a priority setting exercise was conducted, based on a simple voting system where all participated. Each participant was given eight votes which could be applied to any issue – either concentrated on one which the participant felt was overwhelmingly important or distributed across as many as eight different issues. The list below contains the categorized list of issues in a priority order. The following sessions concentrated on some selected priority issues for the hands-on training on how to select and evaluate indicators.

<table>
<thead>
<tr>
<th>Votes</th>
<th>Issues / Problems /Challenges</th>
<th>Opportunities /Solutions / Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Environmental issues</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Seawater quality in the creek and in small ponds, sewage</td>
<td>Regulations and infrastructure, improved studies on water and health problems</td>
</tr>
<tr>
<td>14</td>
<td>Deterioration of historic buildings in old town</td>
<td>Giving economic value of the use of buildings and male property more aware of this. Create funding mechanisms for restoration</td>
</tr>
<tr>
<td>13</td>
<td>Garbage along the shore, littering, illegal dumping (creating mosquitoes-health problems) Local attitude towards maintenance, cleanliness of urban areas</td>
<td>Awareness raising activities (1 year campaign is planned), improve and recalculate garbage collection services, recycling programmes</td>
</tr>
<tr>
<td>8</td>
<td>Cutting and filling along the shore</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Lack of environmental management of tourism sites</td>
<td>Management plans and awareness programmes</td>
</tr>
<tr>
<td>4</td>
<td>Lack of environmental awareness/behaviour</td>
<td>Educate public and visitors</td>
</tr>
<tr>
<td>4</td>
<td>Big variation of climate through the year (very hot periods deterring tourists)</td>
<td>More indoor facilities and public awareness, study climate issues and tourism</td>
</tr>
<tr>
<td></td>
<td>Protection of fragile environment (reef) buoys</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
</tbody>
</table>

### Management issues

<table>
<thead>
<tr>
<th></th>
<th>Lack of marketing and promotion strategy and activities</th>
<th>Branding (for foreign and domestic tourists), create image</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>Lack of clarity of responsibility between agencies, coordination</td>
<td>Improve capacity of airport information, train different service providers, officers dealing with tourists (passport control, taxi drivers)</td>
</tr>
<tr>
<td>9</td>
<td>Lack of tourist information (guides, maps)</td>
<td>Improve capacity of airport information, train different service providers, officers dealing with tourists (passport control, taxi drivers)</td>
</tr>
<tr>
<td>8</td>
<td>Lack of public access to key beaches, not enough sandy beaches, due to private ownership</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Lack of social activities, programmes for visitors, lack of tour operators and packages, variety of products</td>
<td>Organize special events, forums</td>
</tr>
<tr>
<td>5</td>
<td>Seasonality, lack of services and attraction round-year, round the week (weekly, yearly seasonality)</td>
<td>Create more activities and promote them in off-season, and in other districts of Jeddah, coordination of festivals (spread better around the year, especially off-season), coordination with Ministry of Education to match with school holidays (ongoing national plan for summer time vacation, staggering), Create an agenda for year-round activities (conferences, training, exhibitions, programmes)</td>
</tr>
<tr>
<td>4</td>
<td>Lack of tourist transport, mobility</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Lack of daytime facilities and activities for children (esp. during festivals)</td>
<td></td>
</tr>
</tbody>
</table>
| 8 | Regulation and enforcement problems:  
  - Inconsistent application of regulations,  
  - Lack of clarity of regulations  
  - Lack of compliance with land use and shoreline regulations (coastguard should be able to navigate within 400 m from coast), problem of landfills, piers  
  - Development control | |
<table>
<thead>
<tr>
<th>3</th>
<th>Lack of signage (different languages)</th>
<th>Partnership with private sponsors, increase number of signs, standardize signage, place tourist signs to mark attractions,</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Safety and security</td>
<td>Policy patrol 24 hours</td>
</tr>
<tr>
<td>2</td>
<td>Lack of integration of historic values and heritage in tourism programmes, products (information)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Lack infrastructure</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Lack of standards for management and operations for enterprises</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Management of safety in water-based activities (seadoos, boats)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Insufficient capitalization on good access</td>
<td>Building on the strengths of Jeddah as a good transportation access hub</td>
</tr>
<tr>
<td>1</td>
<td>Difficulties of getting visa for quality employees in tourism businesses</td>
<td></td>
</tr>
</tbody>
</table>

### Planning issues

<table>
<thead>
<tr>
<th>18</th>
<th>Land use planning – zoning and associated standards and regulations</th>
<th>New regulation prohibits owning shoreline, regulation of new buildings (e.g. set-back lines), compensation scheme</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Lack of master plan for tourism for Jeddah and complexity of procedures</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Lack of a comprehensive site-management plan for Obhur creek</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Lack of vision</td>
<td>Establish vision for Jeddah as a comprehensive destination</td>
</tr>
<tr>
<td>3</td>
<td>Over-concentration of tourist activities in coastal areas</td>
<td>Providing guidance, incentives for investors for development in other parts of Jeddah and in variety of services, niche products and marketing</td>
</tr>
<tr>
<td>2</td>
<td>Lack of public areas, access along the sharm, dominance of private property-landownership issues</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Unequal quality of urban landscape (maintenance)-beautification of urban areas</td>
<td>On-going flower planting programmes, landscape design, landscaping/public area maintenance budget rose 60% in past years, more balanced distribution of landscaping projects over Jeddah</td>
</tr>
<tr>
<td></td>
<td>Safety – streetscape and infrastructure, street furniture</td>
<td></td>
</tr>
</tbody>
</table>
### Socio-cultural issues

<table>
<thead>
<tr>
<th>No.</th>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>Traffic management, congestion, parking (impacting quality of life of locals)</td>
<td>Infrastructure development (bridges, alternative parking), develop activities in inland areas to alleviate concentration on coast, improving public transport, public awareness</td>
</tr>
<tr>
<td>9</td>
<td>Inappropriate tourist behaviour affecting local values</td>
<td>Need to inform tourists on traditions and religious customs to avoid confrontations, cultural education, information before trip</td>
</tr>
<tr>
<td>11</td>
<td>Tradition as a barrier to tourism (Lack of awareness, understanding, adequate perception of local population on tourism)</td>
<td>Cultural awareness programme, education (Include tourism awareness programmes in school curricula), training of persons handling tourists (e.g. taxi drivers, officials, guides)</td>
</tr>
<tr>
<td>5</td>
<td>Problems for ladies to leave the airport if they are not picked up, or accompanied</td>
<td>Make immigration arrangements more streamlined (STC discuss with Immigration)</td>
</tr>
<tr>
<td>4</td>
<td>Local community participation</td>
<td>Participatory processes and public information</td>
</tr>
<tr>
<td>4</td>
<td>Illegal immigrants (Hajj visitor-leftovers)</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Gender issues of visitation of attractions (unequal rules, where can women or families use services, visit attractions-e.g. entertainment parks)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Lack of clubs designed for women (e.g. fitness, spa)</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Deterioration of building caused by vandalism (graffiti), visual pollution</td>
<td>Awareness programmes, education, law enforcement, create artistic programmes</td>
</tr>
<tr>
<td>1</td>
<td>Privacy affected by crowding</td>
<td></td>
</tr>
</tbody>
</table>

### Economic issues

<table>
<thead>
<tr>
<th>No.</th>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>Tourism sector requires government support for investment</td>
<td>Create investment good conditions and incentives</td>
</tr>
<tr>
<td>15</td>
<td>Inadequate pricing policies, increasing prices, services overpriced, lack of budget options (low cost) for services (e.g. accommodation, parks) in high season</td>
<td>Packaging, government to reduce cost burden of enterprises (land rental), monitor prices</td>
</tr>
<tr>
<td>10</td>
<td>Inadequate quality of services</td>
<td>Monitor quality</td>
</tr>
<tr>
<td>Rank</td>
<td>Issue</td>
<td>Solution</td>
</tr>
<tr>
<td>------</td>
<td>----------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>6</td>
<td>Need investment in accommodation and entertainment</td>
<td>Setting a vision, feasibility studies, funding</td>
</tr>
<tr>
<td>5</td>
<td>Need more international tourists (destination not ready yet)</td>
<td>More events, study international markets</td>
</tr>
<tr>
<td>4</td>
<td>Capturing local benefits from tourism</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Lack of small-scale tourism development</td>
<td>Funding for small projects, classification system for tourism businesses and products</td>
</tr>
<tr>
<td>2</td>
<td>Competition between residential and tourist uses around the Sharms</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Lack of quality and trained Saudi tourism professionals (burden on companies for on-the job training, due to regulation to employ Saudis)</td>
<td>Public-private partnership for training programmes (support existing capacities of companies, trainee programme)</td>
</tr>
<tr>
<td>0</td>
<td>Competitiveness of the destination, and its businesses</td>
<td>New product development, marketing and costing studies</td>
</tr>
</tbody>
</table>
2.6.5 Detailed description of issues and corresponding indicators

This section provides detailed descriptions on the most important issues relating to the sustainable development of tourism for Jeddah and identifies the indicators which are likely to be of greatest value. The indicators evaluation work done by the participants in the February 2006 training workshop is one of the key inputs into this evaluation. Those indicators shown with ▲ were the ones selected as most important by the workshop participants. The issues are arranged according to the typology in the WTO Indicators Guidebook – beginning with social issues, proceeding to economic, environmental and then managerial and planning issues. Those indicators which appear to be the most promising are shown in **boldface**, and in brackets there references on the given issue to the specific sections in the WTO Indicators Guidebook for further information (e.g. WTO 1.1 below).

1. ▲Issue: Local Satisfaction with Tourism (WTO baseline issue 1.1)

The residents of Jeddah, while having a long history of involvement with travellers, en route to Mecca, have had little experience with the form of recreational travel common in most parts of the world. The customs of Saudi Arabia are different from most other nations, with a particular sensitiveness regarding privacy and genders issues. As well, tourist behaviours which would bring little reaction in other nations may be offensive to most residents. In the workshop, it was suggested that there was a need to better inform tourists about traditions and religious customs so as to avoid confrontations and help prepare visitors to be sensitive to the Saudi culture and concerns for privacy. As Saudi Arabia begins to permit organized tours and independent travel to the Kingdom, the local satisfaction with tourism will be a critical factor in the choices which must be made. It is likely that the nature and extent of tourism to be allowed will be directly related to the experience with the first arrivals, and the impact and sensitivity of both tourists and local residents. Thus the satisfaction and opinion of the local population becomes a vital factor in the sustainability of Jeddah as a tourism destination, and in the choice of which tourists to invite, how they are managed, where they are permitted to go, and with what activities they are offered.

**Indicator:**
- Percentage of residents with specific opinions on the impact of tourism on them and their community (as per suggested the questionnaire in Annex A) In the suggested questionnaire, the emphasis is on the relationship of the local people with the visitors, and the degree to which the local residents feel that the tourism is within the limits of change acceptable to them.

**Reason for the use of this indicator:** Only by directly querying the residents can their opinions and reactions be measured. These are essential early warning indicators of perceived problems which may emerge – changes in attitude (which can also be done for specific localities such as the Corniche, the Old Town or Obhur Sharm) are signals of either success or increasing stresses.

**Source(s) of data:** A sample survey of residents (which may be stratified to ensure that specific subsets of residents are included (by e.g. age, gender). The survey could be done at the airport, at hotels, or through tour operators. The involvement of educational institutions and students can be help for carrying out surveys, and it can be linked with tourism courses.
Means to use the indicator: It is expected that the tourism planners can use this as both risk management and input into the tourism planning and management process, and as performance measures for the plan. If begun now, at the outset of the planning process, and at the initial phase of permission for independent travel, it can provide a sound benchmark for future changes. Conducting surveys can be also used as a tool for raising awareness on tourism development issues in the local community.

Benchmarking: Because this is unique to Jeddah, the best benchmarking will be relative to baselines set at the first use of the questionnaire – very timely given the inception of comprehensive tourism planning. It will also be possible to disaggregate results to permit comparison of different parts of Jeddah (e.g. those in the Sharm, the old city or the corniche compared to those in other parts of the City).

2. ▲ Issue: Effects of Tourism on Communities (WTO baseline issue 1.2)
With increased tourism (both domestic and international) the stresses on specific parts of the community can change. The demographics, attitudes (as noted above) and the economic and social costs and benefits tend to change, affecting lifestyles, housing and the local social structure. (e.g. price of real estate near the Sharm, costs at restaurants, availability of low priced hotels). While some changes may be viewed as positive (improved incomes from tourist custom, jobs for youth, wider range of good quality shops and services for residents), others may be viewed as negative (The questionnaire suggested above will likely address some of these concerns).

Indicator(s):
- Number or % of residents (local, national, foreign) working in tourism in Jeddah
- Number or % of local businesses involved in tourism
- % of local GNP derived from tourism (may be easier to calculate % of enterprises for which tourism is a significant part of their sales)
- Number of tourists per day in Jeddah (and in specific sites) (average and for peak day)
- % of residents who feel tourism is positive for the community (Survey)

Reason for the use of these indicators: One of the objectives of tourism development is to benefit the community and region – not just economically but also in the form of social services, jobs and opportunities. Tourism sector managers and planners of overall development need means to judge whether tourism is bringing positive effects and to document the extent. This can also help in decisions regarding infrastructural investment and means to pay for it.

Source(s) of data: The exit questionnaire noted above, with explicit questions on who benefits, whether Jeddah is perceived to be better or worse and other questions on specific local issues is the key source. One means is to undertake tourist/visitor counts; another is to randomly sample customers of shops, restaurants or attractions. Local authorities in Jeddah – Tourism can provide annual data on number of shops, beds for rent, restaurants etc. which can form the core of a repetitive indicators gathering and analysis program.
Means to use the indicators: The main client for these indicators are the City planners, tourism planners and tourism sector managers and leaders – who are involved in taking decisions on how much new tourism of which kind to permit and where. The planning office, Supreme Commission, and Municipal and Sub-Municipal offices (e.g. Obhur) will also find these useful inputs to their planning and control of services.

Benchmarking: Because Jeddah is a unique destination, the best benchmarking will be relative to baselines set at the first use of the questionnaire and for comparisons between communities.

3. ▲ Issue: Access by the Community and Visitors to Public Areas (WTO 1.3)
While much of the coastline is public, key sandy beach areas and suitable water for swimming and boating has significant parts which are private. In resort areas there is lack of beach access, and private ownership of some coastal areas makes public access difficult. Current regulatory mandates provide little ability to control private use, to determine setbacks, access points or dredging and filling of the coast. On peak use days (weekends) public use can be very concentrated – with traffic, parking and recreational use congestion on some public areas (Sharm).

Indicators:
- % of beachfront which is public (also % of sandy beach)
- Number of complaints regarding access
- Number of persons in beach areas in peak days
- Number of cars at beach areas in peak days (% exceeding parking space)
- (see also Planning and control for influence on private property use)

Reason for the use of these indicators: The seafront is the principal attraction of Jeddah for domestic tourists and for some foreign visitors. Access difficulties and crowding can affect long term tourism development. (see also issue of density of use)

Source(s) of data: Area data is available now from plans and cadastral (property) records. Complaints would be more difficult to collect due to dispersed nature of coast use and lack of a single complaint agency.

Means to use the indicators: Input into planning for seafront use (see planning section)

Benchmarking: In many countries all areas below the high water mark are considered to be public and public access corridors permit access to the beach. It may also be useful to use the local questionnaire approach to assess degree of satisfaction/dissatisfaction with level of access and measure changes over time.
4. ▲ Issue: Gender and Tourism (WTO 1.4)
One of the most significant areas of issues relative to future tourism development is the social structure of Saudi Arabia as a host country. For reasons of privacy, religion and tradition, women and men are segregated. Facilities are designed to accommodate the separation of families and unmarried males. Visitors are expected to respect these traditions. Women are not normally permitted independent travel, and recreational opportunities are provided separately for males and females. This can be a challenge for foreign visitors who are often insufficiently aware of the customs, and for the local residents who are not prepared to deal with male or female visitors who do not follow the local norms and customs.

For female visitors, arrival can be a challenge; women who are not accompanied by a male relative or met by a Saudi host may have problems leaving the airport. Women must follow dress traditions, although some leeway has been given for foreign visitors in Jeddah regarding for example type of head covering. Gender issues also affect visitation of attractions; there are different rules regarding where women or families use services, visit attractions -e.g. entertainment parks, beaches) and while some resorts do offer separate facilities for both genders, many do not. Participants also noted a lack of clubs designed for women (e.g. fitness, spa), and constraints on independent travel. (see also Effect of community traditions on tourism WTO 3.1)

Indicators:
• % women visitors who believe that they had good access to tourist facilities (compare to % men) -survey
• % potential foreign visitors who believe that Saudi Arabia (Jeddah) is a welcoming destination for female visitors) – possible survey in potential markets
• Number of clubs, resorts and facilities offering recreational activities for women (capacity of these facilities)
• Number of women with employment in the tourism sector
(Note: current baselines for many indicators suggested in the WTO Indicators Guidebook can be estimated as there is as yet very little female participation in the sector or in visits apart from family travel. As policies evolve, use of a range of indicators relative to women’s participation, wages etc, may become useful)

Reason for the use of these indicators: Barriers to female visitors may be significant in limiting future tourism to Jeddah – depending on what type of tourism is desired

Source(s) of data: Data on female visitors is available from immigration records, accessible to the Supreme Commission on Tourism. Attitudinal surveys and exit surveys would be required to obtain the other indicators. Information on clubs and facilities could be obtained from the Chamber of Commerce or the Municipality.

Means to use the indicators: This can be an important factor in choosing what type of tourism to market and to whom. If independent visitors are to be sought, and females are to be admitted as independent travellers or in tours, these factors will need to be addressed. What will be the limits to acceptable change?

Benchmarking. Measure changes for Jeddah over time.
5. **Issue: Deterioration of Old Buildings in Jeddah (WTO 2.1)**

One of the key attractions which is likely to be of greatest interest to tourists (particularly those interested in culture) is the collection of old Jeddah architecture in the Old City. The pattern of growth of Jeddah has placed these examples of traditional architecture at risk. Many have been allowed to deteriorate, and currently are used as tenement residences for the immigrant and temporary workers. At the same time, a strong market for real estate in the core is placing pressures on the area, with many owners seeking to build modern office and apartment buildings on the sites, by replacing the old ones. As well, there have been incidents of vandalism, particularly graffiti. While there is some visual pollution – due to the past construction of buildings which do not respect the Jeddah vernacular, the ambience of the Old City and its markets remains very attractive for tourism. Related issues include rapid rise of property values, lack of access to funds for rehabilitation, and lack of awareness of the historic and cultural values associated with the site. As well, enforcement of regulations has been a challenge, even though the Old City has been nominated for UNESCO heritage status.

★★ (Note: this was one of the key issue areas which received specific detailed attention in the workshop session. The table on the following page is the working document produced in the small working group who addressed the range of possible indicators which could respond to this issue.)
Traditional houses and lively shops in the Old City

Entrance of the Nassif house, the Museum of Old Jeddah

Deteriorating buildings raise both aesthetic and safety concerns

A blend of traditional and modern architecture
<table>
<thead>
<tr>
<th>POSSIBLE INDICATORS</th>
<th>Relevance (how is the indicator linked to decision making processes, who and how could use it)</th>
<th>Feasibility (capacity to collect and process information: availability of data sources, collection methods, technical implications)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of historic buildings - each building is listed</td>
<td>Key baseline indicator of the size of the resource. Relevant to: Municipality, Antiquity Dept., SCT</td>
<td>Already being collected</td>
</tr>
<tr>
<td>Degree of importance: Historical; Architectural features; Condition of building; Authenticity</td>
<td>Gives more detail on priority properties to conserve</td>
<td>Already being collected</td>
</tr>
<tr>
<td>Number of buildings abandoned</td>
<td>An indicator of immediacy of the threat of deterioration. Also relevant to Security Dept.</td>
<td>Already being collected</td>
</tr>
<tr>
<td>Visual appearance of exterior – state of deterioration</td>
<td>An easy but crude indicator of threat but would need further investigation</td>
<td>Check is easy to make but will need agreed objective criteria</td>
</tr>
<tr>
<td>Requests for renovation vs to demolish (Over 300 requests for renovation and 14 to demolish in past years)</td>
<td>Clear indicator of balance of positive and negative change and attitude of owners</td>
<td>Already being collected</td>
</tr>
<tr>
<td>Number of requests to restore received per year</td>
<td>Indicates trend/growth in positive response and whether situation is improving</td>
<td>Already being collected (currently 15 – 25 requests per year)</td>
</tr>
<tr>
<td>Number of buildings restored per year as a result of requests (So far all requests have gone on to restoration)</td>
<td>Key indicator of success and trend</td>
<td>Total known. Annual trend could be recorded</td>
</tr>
<tr>
<td>Attitude of property owners to restoration and maintenance. Old study of property owners exists – new one will be done by university</td>
<td>Property owners’ attitude critical to policy and success. Local owners more positive.</td>
<td>More difficult. A new survey of attitudes could be made and regularly repeated.</td>
</tr>
<tr>
<td>Amount of loan finance offered through Government</td>
<td>A reasonably simple indicator of government policy response</td>
<td>Is already recorded</td>
</tr>
<tr>
<td>Response to new incentives – loans and offer of development land outside the old city</td>
<td>An indicator of property owner response.</td>
<td>Is already recorded</td>
</tr>
<tr>
<td>Income earned from tourism/activities in each property</td>
<td>Indicates relevant and role of tourism as a part of solution. Relevant to SCT, Municipality, Property owners</td>
<td>Would need to define tourism activity here. Would need a survey (possible). Could be done via SCT</td>
</tr>
<tr>
<td>Number of visitors to Old Jeddah compared to rest of Saudi Arabia (Collected by all tour operators or schools sending a fax, also domestic groups. Record of visitors to the Nassif house.)</td>
<td>Indicates relative importance of the resource for tourism and also the potential for tourism to provide income earning potential from restoration</td>
<td>Some info already collected, including visits to Nassif house. Could be obtained from street surveys or survey of educational group visit planners and tour operators.</td>
</tr>
<tr>
<td>Coverage of Old Jeddah in newspapers/media</td>
<td>Indicator of perceived importance of the resource and issues. Used by municipality now</td>
<td>Quite easy to monitor press</td>
</tr>
<tr>
<td>Visits by VIPs</td>
<td>Considered to be a measure of perceived importance (but very subjective)</td>
<td>Quite easy to register</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Authenticity of the restoration</td>
<td>A key issue for the Municipality, which wants restoration to be authentic</td>
<td>Less precise issue to measure. Scrutiny of plans and monitoring implementation should be encouraged</td>
</tr>
<tr>
<td>Type of use of old buildings</td>
<td>Givens indication of role of tourism. The Municipality thinks would be useful to show trend of use</td>
<td>Needs regular checking, via a usage survey. Observation and/or property owner survey</td>
</tr>
<tr>
<td>Building capacity – number of visitors they can take</td>
<td>Carrying capacity may affect future planning for tourism</td>
<td>Not a clear cut indicator and would require survey</td>
</tr>
<tr>
<td>General level of cleanliness in the old town</td>
<td>Felt to be a parallel and important issue. Overall upkeep would encourage property owners to take care</td>
<td>Regular observation. Feedback from tourists via an exit survey</td>
</tr>
<tr>
<td>Tourists’ response to Old Jeddah</td>
<td>Indicator of importance of the resource and income earning potential</td>
<td>Feedback survey of tourists</td>
</tr>
</tbody>
</table>

**Suggested Priority Indicators:**
- Number of historic buildings (#/% data according to condition, ownership, whether abandoned or not, or in deteriorated state)
- Number or % of requests for demolition/restoration approved (annually)
- Current use of old buildings (% with tourism use or access)
- % visitors who believe that Old Jeddah has unique historic character (survey)

**Reason for the use of these indicators:** Old Jeddah is a unique historic asset, which is under stress. For foreign visitors (particularly for those sensitive to culture and tradition) Old Jeddah will be the main reason to visit and stay in Jeddah. Any deterioration of this asset will threaten future tourism.

**Source(s) of data:** Jeddah Municipality and Antiquity department

**Means to use the indicators:** Performance measure for level of response to risks to this asset. May be critical input into establishment and maintenance of World Heritage Status

**Benchmarking.** UNESCO could provide benchmarking for similar built sites (e.g. Safronboylu in Turkey, Old Havana in Cuba, Quebec Old Town in Canada), and from heritage sites in danger where similar problems occur.

6 ▲ Issue: Community Involvement and Awareness. (WTO 3.1)
As tourism spreads, there is increasing need for good information at the level of the business and individuals who are involved in and/or affected by tourism. This can lead to greater, participation and ability to mobilize all parts of the community (government,
business, and institutions) to achieve common goals. It can also better prepare the community and officials to deal with tourists who may behave in ways which are different from local norms. For some, this may involve capacity building and training to participate more fully in the tourism industry, to understand the concerns of tourists, and to help manage the tourist experience. There are now many small entrepreneurs, larger businesses and organizations involved in tourism in Jeddah and there is an opportunity for greater involvement in tourist services, tours, experiences.

**Indicators:**
- Degree to which the community is satisfied with the information it is receiving on tourism and on sustainable tourism issues
- Several of the questions on the questionnaire re participation in tourism and the level of benefits perceived or received
- Number of organizations and persons involved in the formulation of the Jeddah Tourism Plan, number of consultations held

**Reason for the use of these indicators:** This can be a good early warning for authorities regarding emerging issues at the community level, as well as a performance measure for degree of inclusiveness in the planning and benefits from tourism (the latter being an important issue for Jeddah – sharing of benefits)

**Source(s) of data:** Most will come from a resident survey. (see Annex A)

**Means to use the indicators:** Demonstrate that tourism is bringing benefits; can help to measure progress in increasing involvement by the community and increasing the understanding of tourism.

**Benchmarking:** Can be compared among communities and sites and help understand equity issues and degree of community sensitivity to new impacts. Over time may signal changes in how communities perceive tourism. (see also the following issue)

7. **Issue: Effects of Community Traditions on Tourism (WTO baseline issue 3.1)**

One of the issues which received the greatest attention in the workshop was that of the relationship between tradition and tourism. Some saw tradition as a barrier to tourism – particularly where tourists were unfamiliar with gender roles and expected public behaviour or were not prepared to visit a country where the constraints on their behaviour would be very different from their home country. The discussion focused on the limits to acceptable change – and highlighted areas of potential concern, should a broader range of tourism occur in Jeddah. From the discussion it was clear that there was (among both tourists and locals) a perceived lack of awareness, understanding, adequate perception of the norms and expected behaviours of the others. A broader spectrum of tourism – focused on cultural and natural assets, reefs and beaches will provide new challenges. There has to date been little local community participation in the planning and management of tourism. Needs were also identified for cultural awareness programmes (both tourists and locals, education (Include tourism awareness programmes in school curricula), training of persons handling tourists (e.g. taxi drivers, officials, guides) and broadened participatory processes and public information
(Note: this was one of the key issue areas which received specific detailed attention in the workshop session. The table on the following page is the working document produced in the small working group who addressed the range of possible indicators which could respond to this issue.)

<table>
<thead>
<tr>
<th>POSSIBLE INDICATORS</th>
<th>Relevance (how is the indicator linked to decision making processes, who and how could use it)</th>
<th>Feasibility (capacity to collect and process information: availability of data sources, collection methods, technical implications)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong># visitors by gender</strong></td>
<td>Shows if families are involved in tourism to this site</td>
<td>Simple counts possible in key sites. Airport and hotel data for overall destination.</td>
</tr>
<tr>
<td><strong># restaurants and resorts with family facilities % with separate facilities</strong></td>
<td>Shows range of offer – identifies gaps</td>
<td>Data exits – need to be compiled</td>
</tr>
<tr>
<td><strong>Cost of building separate facilities to meet gender separation needs</strong></td>
<td>Shows benefit/cost of separation</td>
<td>Very difficult and costly to obtain</td>
</tr>
<tr>
<td><strong>Family situation of visitors (by purpose of visit)</strong></td>
<td>Key factor in who coming and why</td>
<td>Need to make part of visitor exit survey</td>
</tr>
<tr>
<td><strong>% of tourists coming for cultural or religious reasons</strong></td>
<td>Data can separate Hajj from other tourism</td>
<td>Available from immigration/security – on visas</td>
</tr>
<tr>
<td><strong>Range of activities and participation on seafront (by age, gender, group type)</strong></td>
<td>Measure of current use of key assets</td>
<td>Would require sample survey or counts</td>
</tr>
<tr>
<td><strong>Image of Jeddah/Saudi Arabia (by visitor type by season)</strong></td>
<td>Key measure of attraction – use for image indicator</td>
<td>Collect as part of exit survey – use for image issue.</td>
</tr>
<tr>
<td><strong>Visitor expectations upon entry/exit (sorted by age, nationality, gender etc)</strong></td>
<td>Key measure of attraction</td>
<td>Collect as part of exit survey</td>
</tr>
<tr>
<td><strong>Attitude of local residents to tourism/tourists (by locality such as corniche. Sharm, old Jeddah, in hotels and restaurants) (by age, gender)</strong></td>
<td>Direct measure of potential resistance to tourism</td>
<td>Need to use resident survey</td>
</tr>
<tr>
<td>Area</td>
<td>Description</td>
<td>Use/Measurement</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>% of people who think Jeddah is what they expected (before and after survey reaction)</td>
<td>Good measure of overall image – also use value for money</td>
<td>Use exit survey – combine with other survey questions</td>
</tr>
<tr>
<td>% of residents who believe that tourists violate their traditions (Questionnaire)</td>
<td>Direct measure of tourist impact – use to identify stresses</td>
<td>Need to use resident survey</td>
</tr>
<tr>
<td>Willingness of visitors to come again (by demographics, reason for visit) (Questionnaire)</td>
<td>Direct indicator of attractiveness of destination</td>
<td>Use exit survey – combine with other questions for detail</td>
</tr>
<tr>
<td>Level of sensitivity of tourists to key local values and traditions (focus survey) % of tourists who agree that they received good information on local sensitivities and traditions</td>
<td>Measures potential for cultural conflict – and access to prior information</td>
<td>Would require incoming survey as well as exit survey – to validate responses</td>
</tr>
<tr>
<td>% tourists who report having bad experiences with officials</td>
<td>Would allow response and target training if needed</td>
<td>Could be part of exit survey</td>
</tr>
<tr>
<td>Number of complaints received from tourists</td>
<td>Direct measure of perceived problem</td>
<td>Need single point for complaints to be registered</td>
</tr>
<tr>
<td>#/% of officials who have awareness/training re tourism</td>
<td>Measures level of effort to deal with complaints/tourists</td>
<td>Easy to measure using training records (but likely from several places)</td>
</tr>
</tbody>
</table>
**Recommended Indicators (subset of above list)**

- Family situation of visitors (by purpose of visit)
- Attitude of local residents to tourism/tourists (by locality such as corniche, Sharm, old Jeddah, in hotels and restaurants) (by age, gender)
- % of residents who believe that tourists violate their traditions % of people who think Jeddah is what they expected (before and after survey re knowledge, reaction)
- Willingness of visitors to come again (by demographics, reason for visit)
- Level of sensitivity of tourists to key local values and traditions (focus survey)
- % of tourists who agree that they received good information on local sensitivities and traditions

**Reason for the use of these indicators:** With growth in independent tourism, contact between tourists and locals can cause conflict and unease. Unfortunate contacts can harm both the tourism industry and local sensibilities. It is important to monitor the social impacts, to permit early action and prevention of problems.

**Source(s) of data:** The main sources of data will be questionnaires- local surveys for resident attitudes and reactions and visitor surveys for tourist attitudes and reactions. Base information on family status of visitors can be obtained from visa sources.

**Means to use the indicators:** Authorities understand that managing the nature of contact between visitors and locals will be important to tourism in Jeddah – what are the limits of acceptable change being reached? Do tourists accept the conditions associated with their visits?

**Benchmarking.** The key use of these data will be to measure changes over time in specific sites and parts of the community.

**8. Issue: Sustaining Tourist Satisfaction (WTO baseline issue 4.1)**

Tourist satisfaction is considered a fundamental success factor in sustaining a tourism destination. Changes in tourist expectations and whether these have been fulfilled, numbers of complaints, tourist reports of problems or good experiences all affect future tourism. Tourist perceptions may be one of the most important factors affecting long term sustainability – of both enterprises and destinations. Jeddah is in a period of rapid development, and the character of the Old City, the nature of the Sharm as a recreational resource, and access to the shore are being affected: this may have impacts on the image of Jeddah and the experience of tourists who visit it. As well, different types of visitors (weekend visitors from the Province or Riyadh, international visitors, those on the Hajj) may have different values and reactions to changes. This information can be obtained only through surveys.

**Indicator(s):**

- Level of satisfaction by visitors on exit questionnaire (see Annex A for a model questionnaire adapted to Jeddah)
- Perception of value for money (also from the questionnaire)
- % of return visitors
- Complaints registered (at hotels, tourist office)
Reason for the use of these indicators:
Jeddah currently has no systematic and regular means of monitoring tourist reaction. What do they like and dislike? Why do they come? What do they want more of, or less of? Were there any barriers to them enjoying themselves? This is critical information for the ongoing planning and management of tourism in Jeddah – and can greatly strengthen the sustainability of the destination and of key components of the tourism experience in Jeddah and in its attractions and establishments. I also can highlight visitor values and expectations and feed into the debate on how many tourists of what types are wanted.

Source(s) of data:
While some enterprises (e.g. Hotels) survey visitors, this provides only a partial view of what is important to the destination. What is needed is a regular exit questionnaire. Because there is a limited number of access points for most visitors, (Jeddah airport, the port, a few major roads used by domestic travellers) it would be possible to sample visitors as they pass key points. For example, a small random sample could be taken on land transport entering or leaving Jeddah (pick six seats at random and do the survey on the bus. Exit surveys of those who travel by air could be done in the departure lounges at the domestic and international air terminals - asking where you stayed - with specific questions on e.g., Obhur or the Old City for those who have visited them.

Means to use the indicators: Basic information regarding success of tourism. Baseline for planning and management at all levels.

Benchmarking: Because many of the questions will be similar to those in use in other destinations, some comparisons can be made.

9. Issue: Public Safety and Security (WTO Issues 5.3, 5.4)
Public safety and personal security for tourists are global issues, affecting all destinations. Tourists need assurance that they will have a safe journey, that local officials will help them if they get into difficulty, and that global and regional issues will not affect their trip. Both actual levels of safety and perceptions can be important.

Indicators:
- Total number of crimes reported involving visitors (by type – e.g., robbery, assault, etc).
- Number of visitors charged with crimes (by type per annum)
- % of tourists (and potential visitors) who believe Jeddah to be a safe place to visit

Reason for the use of these indicators: Personal safety is a key factor in choice of destination worldwide. Data can be used to counter negative perceptions and show relative safety. Rising numbers of incidents can be a warning signal.
Source(s) of data: National Center of Information
Means to use the indicators: Show relative safety, measure performance.
Benchmarking, This indicator is measured by many destinations and often posted on websites (e.g. Interpol).
10. **Issue: Tourism Seasonality (WTO Baseline issue 6.1)**

Peak season for Jeddah is determined by two factors: the weather, and the timing of the Hajj. During the Hajj, concentrated in less than two weeks, some four million pilgrims pass through Jeddah. This mass form of travel happens annually and places significant stress on the infrastructure of Jeddah and the entire Province of Mecca. The second concentration of tourism occurs in the summer months as mainly domestic travellers seek the seashore. The peak period coincides with the periods when Jeddah is warm (in some cases very hot) and water access is the key attraction. The winter season is the low season, particularly during the week when many of the hotels and some restaurants are closed; opening for weekend getaways and business events.

**Indicator(s):**
- Tourist arrivals by month or quarter (distribution throughout the year)
- Occupancy rates for licensed (official) accommodation by month (peak periods relative to low season) and % of all occupancy in peak quarter or month)
- % of business establishments open all year (and % tourist accommodation open all year) (alternative is to measure number of days open for establishments and report percentage open more than 200 days)
- Number and % of tourist industry jobs which are permanent or full-year (compared to temporary jobs)

**Reason for the use of these indicators:** Variation in occupancy, use levels and employment reduce the ability to obtain revenues, retain staff, and obtain revenue streams to support investment in facilities and infrastructure. Often facilities need to be built to accommodate peak use levels but lie vacant in the off season. Efforts to spread tourism into shoulder and low seasons can help to stabilize the industry and overall development.

**Source(s) of data:** Arrivals data is already collected by the Supreme Commission. Occupancy rates for registered hotels are also collected. Data regarding employment and seasonality of hotels and businesses can be obtained from the Ministry of Commerce and industry and the National Center for Tourism Information and Research (MAS)

**Means to use the indicators:** These data can show needs and opportunities for diversification of the product, development of attractions to strengthen shoulder seasons and off-season tourism, and act as performance measures to show whether or not the policies and projects are successful. Principal user will be the Supreme Commission, the Municipality and the tourism industry. This is key information for the Municipality, as public services (e.g. cleaning, maintenance of parks, transport services), can be greatly affected by a seasonal influx of a great number of visitors.

**Benchmarking:** Comparable data for most of these measures is available for other destinations (often considered basic tourism statistics).
11. ▲ Issue: Employment (WTO 6.3)

The growing tourism industry has several issues regarding the hiring, training and retention of qualified employees. Many tourism sector employees are temporary workers from south Asia; issues relate to working conditions, visa requirements, training and service quality. This is related as well to visitor perception of quality of service, and to integration of visiting workers into Jeddah social norms. The Jeddah Tourism Development Plan, established in 1995, provides the following detail on human resources: “The tourism sector employs around 55,000 people, including the restaurant and fast food sector, although these additionally serve the resident community. Few Saudis and few women work in the sector, and there is no tourism related training in the area. There needs to be a major initiative to establish hotel and tourism courses within existing colleges and universities, for new recruits and to provide courses for existing staff.”

Indicators:
- Total number of persons employed in the tourism sector (by age, nationality)
- % of employees qualified/certified
- Retention level of skilled employees
- % of tourism sector employees who are in Jeddah on temporary work status
- Number of courses on offered on tourism skills and level of participation

Reason for the use of these indicators: The tourist experience is greatly affected by the quality of service and the relationship with key employees. Information on supply of trained employees relative to demand will be useful to target action to develop and retain skilled employees.

Source(s) of data: May require survey of industry (hotels, restaurants). The National Project For Tourism Human Resources Development can possibly provide data.

Means to use the indicators: Use to target action to manage employee retention and training.

Benchmarking. Could be compared to other Saudi destinations through hotel data. Compare as well to e.g. Dubai, Maldives where guest workers are important to the tourism industry.

12. Issue: Community and Destination Economic Benefits (WTO baseline issue 6.5)

Discussion with Jeddah stakeholders revealed a number of concerns relating to the capture and distribution of benefits from tourism. Components of this issue included the benefits retained in the community, concern regarding the effectiveness of mechanisms for distribution of benefits among stakeholders (e.g small businesses), draw on public services and infrastructure. Many tourism sector businesses are large scale international organizations. There is a perceived lack of small scale tourism development/tourism businesses and services, including tour operators, services aimed specifically at tourists.

Indicator(s):
- Number of local people (and ratio of men to women) employed in tourism
- Average tourism wage relative to overall average wage
- Number of tourism enterprises (% locally owned)
• Tourism revenue as percentage of total revenue generated in the community (tourism as % of local GDP)
• Total tax revenue from tourism

*Reason for the use of these indicators:* Tourism is a growing component in economic development. If baselines can be established, this becomes a key measure of the health of the industry and its relative importance – can be used to draw attention to the needs of the sector.

*Source(s) of data:* Government data from the National Center for Tourism Information and Research and the Ministry of Economics and Planning. Precise information is not available currently for Jeddah, but for Saudi Arabia in general tourism represents 3.9% of GDP. Estimates of contribution to local GDP will normally be difficult, but employment data can be used as a proxy.

*Means to use the indicators:* These indicators are basic information on the economic vitality of the industry and its contribution to the local economy

*Benchmarking:* Time series for Jeddah would be the best comparative measure, although some other world destinations (e.g. Balearic Islands, Canaries) do provide local GDP information

13. Issue: Investment (WTO 6.6)

In the workshop, there was some discussion on the lack of good access for small enterprises and less wealthy individuals to credit and or funding sources. This was considered to be one of the barriers to the greater establishment of small enterprises taking advantage of tourism. Overall the sector was considered to need investment in accommodation and entertainment; perhaps needing government support for investment. Most agreed that it was the government role to create good investment conditions and incentives. It was also noted that, given the general lack of taxes on individuals and businesses, some of the approaches which work in other countries (such as taxed holidays, quick write off of investments etc.) would not be useful in Jeddah.

As well, the seasonality of tourism (see section on Seasonality) was seen as a barrier to the establishment of robust small businesses serving the sector.

*Indicators:*
- Number of small tourism enterprises operating in Jeddah
- % workers in the community directly employed in tourism
- Amount provided as incentives to small and medium enterprises in credits, grants or other financial instruments).
- Amount provided by government as incentives to new tourism enterprises

*Reason for the use of these indicators:* These measure the degree to which MSMEs are part of Jeddah tourism, and access to support. Also the indicators can be developed to
measure amount of incentive to the tourism industry (note difficulty to isolate this information from many potential funding sources and also need to clarify which enterprises are to be classed as tourism businesses if this is to be done.)

Source(s) of data: Jeddah Municipality

Means to use the indicators: Show progress in bringing the benefits of tourism to the community.

Benchmarking. No good benchmarks- best done as comparison over time.

14. ▲Competitiveness (WTO 6.7)

All tourism destinations and enterprises are in a competitive market, where the relative costs and range of benefits which tourists receive are constantly compared. Competitiveness is relative – involving comparisons with other destinations and opportunities. The workshop discussions highlighted issues related to the pricing of accommodation and services, the absence of standards and price regulation or control policies, concerns over increasing prices (some considered them excessive), particularly in peak season, and the lack of budget options (low cost) attractions, accommodation and services particularly in high season. As well, there was discussion of the positioning of Jeddah and its businesses in the tourism marketplace, the developing of new products and packages, and the potential role of government in helping to enhance the competitiveness of Jeddah through e.g. vision setting, marketing and cost related policy studies. It was noted that the strong marketplace in season is the prime driver of prices, and may continue to be the principal pricing factor. While it is possible to measure a very broad range of factors which pertain to competitiveness (see WTO Guidebook p 143) a smaller range will be of optimal utility to Jeddah.

Indicators:
- % of tourists who believe Jeddah to be good value for money (exit survey)
- Average price paid per room day (by season, type of accommodation)
- Amount spent to market Jeddah (cooperative product development and marketing)
- Use also % occupancy data and information on image (see issue 12.4 on image in WTO Guidebook)

Reason for the use of these indicators: This is an early warning indicator of opinion change regarding Jeddah. Used with other indicators it can be an input in to decisions on policy changes (e.g. funding for product development, decisions on new hotel or resort development)

Source(s) of data: Exit survey for opinion of value, Commission and Jeddah tourism figures for other economic and policy factors.

Means to use the indicators: Can be a direct input into marketing strategies and new product development.

Benchmarking. Comparative data with other destinations is most useful for question of value for money

15. ▲Issue: Protecting Critical Ecosystems and Fragile Sites (WTO 7.1)

The most important natural asset of Jeddah are the beaches and the sea, particularly the Obhur Sharm and the area accessible from the Corniche. As well, near shore and
offshore reefs are accessible points to the rich sea life of the Red Sea. There has been considerable construction on the shoreline, including the creation of the Corniche, largely through fill out to the reef edge. Both in the Obhur Sharm and on the coast north of the Sharm there is dredging and filling which is altering the natural coast. There has been little effective environmental review; some studies show that areas of the reef and sea life are still healthy, while others have been degraded. There is no comprehensive environmental management in place, although work under the Red Sea program is leading towards more coastal zone management. For key reef areas (offshore but accessible from Jeddah) buoying of reefs would be a good solution, reducing anchor damage, although there is little enforcement of use of fragile reef areas. The general level of environmental awareness of those who use the fragile coast and sea resources is low.

**Indicator(s):**
- Number of protected sites (plus area and level of control/protection)
- Intensity of use for key sites (number of tourists per Km² (Number of boats)
- Percentage of fragile ecosystems, like reefs, (from inventory) with protection and percentage/area considered degraded
- Percentage of coast in natural condition (also percentage filled per year)
- Number of trained protection officers

**Reason for the use of these indicators:** These indicators, along with those cited earlier regarding tourist reaction to Jeddah, are critical information regarding the state of the Jeddah environment and the level of ability to continue to sustain tourism. New tourism will likely be focused on the natural environment (growing demand for diving is an example).

**Source(s) of data:** PERSGA and the Marine College have done studies and have the capacity to monitor these variables – particularly those related to the state of the marine environment and key reef areas.
Means to use the indicators: Key performance measure regarding the maintenance of the prime tourism assets.

Benchmarking: Best use is time series for state of key sites. PERSGA can provide comparative data for other Red Sea sites.

16. ▲ Issue: Sea Water Quality (WTO 7.2)

Water based tourism is important to Jeddah. There are many public and private areas for swimming in the sea. The key risks to bathers derive from seawater contamination, particularly from human waste and industrial contaminants. Where there is concentrated beach use, and contaminants enter the sea untreated there is high risk of waterborne diseases. It is an especially key issue in the Sharm, as a closed creek where the water exchange process is slow. Increasingly, beaches worldwide are monitoring water quality and if needed closing beaches when levels of coliform or other contaminants exceed limits. The Marine College has been conducting studies on seawater quality, but not on a regular basis.

Indicator(s):
- Level of contamination of sea water (faecal coliforms, campylobacter, etc.)
- Amount of debris and solid waste on the seabed
- Tourist perception of water quality (on exit questionnaire)

Reason for the use of these indicators: Contamination level is critical early warning system – essential if tourists and locals swim in the sea. It is also a measure of potential harmful impact on fragile sea species – coral and fish.

Source(s) of data: Daily sample of water in key areas (at least in seasons). To be done by PERSGA or the Marine College supplied daily to tourist bureau and municipal officials – who can post warnings and/or close swimming areas if needed).

Means to use the indicators: Daily posting of water quality warnings if needed – in key swimming and boating sites and in hotels.

Benchmarking: Compare to World Health Organization standards. Also for practical application to beaches, see the Blue Flag international beach certification.

17. Issue: Energy Management (WTO baseline issue 8.1)

Growing tourism requires increased energy - for cooking, heating, cooling, laundry, maintenance of gardens and landscaping. Most tourism properties in Jeddah have air conditioned guest rooms. Tourists normally use much more energy per capita than local residents, and rapid growth may place strain on the power grid. While Saudi Arabia is the
world’s largest producer of petroleum products, efficiencies will yield financial advantages to tourism businesses and consumers of energy, and contribute to reduction of greenhouse gas emissions.

Indicator(s):

- Per capita consumption of energy (overall, and for the tourist sector, per person day)
- Percentage of tourism sector businesses participating in energy conservation programs, applying energy saving devices, or renewable energy sources

Reason for the use of these indicators: Sustainable tourism development includes efficiency of resource use. Energy management is one of the easiest and most productive means for the tourism sector to contribute to more efficient, cost effective and sustainable forms of development. There is some evidence that travellers have preference for “sustainable” or “environmentally sound” properties, considering this to relate to quality and cleanliness.

Source(s) of data: Not currently available – if used, it will need to be collected directly from hotels and resorts.

Means to use the indicators: This can be used both for energy planning and management and to showcase greening activities in Jeddah

Benchmarking: Comparative data are available from many other destinations – which are documenting per tourist energy use.

18. ▲ Issue: Sewage Treatment – (WTO baseline issue 9.1)

Sewage treatment is important to Jeddah. Because the focal point for most visitors to the Corniche and Obhur Sharm is the sea, and many tourists spend much of their time on or near the water, sewage contamination is central to maintaining the image of the destination as well as health of those who swim, boat or fish. At present, most sewage from Jeddah is untreated, and is released into the sea. Particularly in constricted areas like the Sharm, sewage levels may be significant – these are not regularly monitored (see seawater quality above)

Indicator(s):

- Percentage of sewage from the destination (Jeddah, the Sharm) receiving treatment
- Percentage of tourism establishments on approved treatment systems.
- Percentage of scenic spots with suitable sewage/toilet systems to handle the visitors

Reason for the use of these indicators: These are indicators of the level of management of waste water both by tourism and the others whose waste may contaminate the key assets for tourism.

Source(s) of data: Municipal Authorities
Means to use the indicators: These indicators help substantiate the need for sewage treatment systems and can act as performance measures.

Benchmarking: Goal is 100% on suitable systems.

19. ▲ Issue: Solid Waste Management (WTO baseline issue 9.2)
The management of solid waste is a growing issue in Jeddah, as it is in most tourism destinations worldwide. Garbage is created by tourists and locals alike, and increasing quantities of that garbage do not degrade naturally. The workshop discussed the issues of waste including potential for reduction, reuse, recycling. Many locations and sites have insufficient waste management, and growing tourist numbers are increasing the job of garbage collection. Participants identified problems of unofficial dumping, of accumulation of garbage on roadside and in the sea. Concern was expressed that there was insufficient environmental awareness.

Indicator(s): (see below for long list developed in the working group)
- Total volume of waste produced in Jeddah (and by tourism enterprises)
- % of waste recycled (% hotels involved in recycling)
- Amount of garbage thrown away in beaches, corniche and other public areas (kg/tonne per day, week) (Quantity of waste collected from roadsides riverbanks and public areas)
- Percentage of tourists who were bothered by excessive litter in the streets and tourist destinations (exit questionnaire)

★★(Note: this was one of the key issue areas which received specific detailed attention in the workshop session. The table on the following page is the working document produced in the small working group which addressed the range of possible indicators that could respond to this issue. The recommended indicators above are a small subset of these, standardized where possible to be compatible with the form in use in other destinations to address solid waste issues – one of the most important issue areas in most destinations where indicators have been applied)
<table>
<thead>
<tr>
<th><strong>POSSIBLE INDICATORS</strong> (from working group discussions)</th>
<th><strong>Relevance</strong> (how is the indicator linked to decision making processes, who and how could it be used)</th>
<th><strong>Feasibility</strong> (capacity to collect and process information: availability of data sources, collection methods, technical implications)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount of garbage collected (kg per day, per month), specified from hotels and tourist facilities (% of total)</td>
<td>User: Municipality, City Council, Use: for the calculation of garbage collection services, allocation of workers, trucks, relocate them to places more needed, allocation of garbage collection capacities, scheduling of collection services</td>
<td>Municipality registry data: number of trucks, weight. There is information on total waste collected available since about 10 years, when municipality started to contract collection and recycling services. Part of the waste is collected by individuals and recycled to factories (cans, paper picked up), before collected by municipality. Garbage from ground and containers is collected together. Needs sampling on litter on ground- collectors to weight garbage collected from ground before throwing to truck – ratio of garbage from container compared to littering can be defined. University can help in research Observation, garbage counting in sample areas.</td>
</tr>
<tr>
<td>Amount of garbage thrown away in beaches, corniche and other public areas (kg/tonne per day, week)</td>
<td>Evaluate results of awareness raising and cleanup campaigns Can lead to changes in frequency and timing of collection and cleaning</td>
<td></td>
</tr>
<tr>
<td>In key areas: amount of garbage per square meter, km</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surface of area covered by construction garbage</td>
<td>Related to visual pollution and image</td>
<td>Observation, garbage counting in sample areas</td>
</tr>
<tr>
<td>Amount of litter on sea bottom</td>
<td>Shows potential harm to fragile ecosystems from waste</td>
<td>Sources: Marine College, Dream Divers, Saudi Geological Survey, Saudi Aramco Needs communication with data providers, so far not used for tourism management</td>
</tr>
<tr>
<td>Quantity of mosquitoes and rats in garbage dumping areas</td>
<td>Relevant to health concerns, image</td>
<td>Would require specific survey</td>
</tr>
<tr>
<td>Odours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of trained cleaner employees, availability of collection equipment</td>
<td>Internal management performance measure for waste collection agency</td>
<td>Simple – from internal records</td>
</tr>
<tr>
<td>Amount, % of waste recycled</td>
<td>Municipality needs information to calculate need for contracting cleaning and recycling services Municipality saves money on cleaning and waste treatment services, if recycling is done more efficiently.</td>
<td>From recycling companies, have information per types of waste, might be difficult to define source (from individual collectors, from supermarkets), municipality can coordinate with recycling factory to get data. PME can help in this Effective program may require regulation for supermarkets, hotels to separate waste and transport it to collection points</td>
</tr>
<tr>
<td>Savings from recycling (sales of materials, reduced disposal costs)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of hotels recycling, doing separate waste collection (now it is 0)</td>
<td>Specific measure of performance by tourism sector</td>
<td>Collect via hotels</td>
</tr>
<tr>
<td>Public awareness programmes (extent, outreach, participation)</td>
<td>SCT campaign called “Leave no Trace”. Programme in Jeddah with mosques for community clean up programmes</td>
<td></td>
</tr>
</tbody>
</table>
Number of beach cleanup events, number of participants, volume of waste collected | Last year 400 divers participated in beach and sea cleanup,  

Perception of locals and tourists on littering | Municipality, SCT, PTO, tourism businesses.  

% of tourists satisfied with cleanliness | Need to define from different areas, e.g. creek, beach, old Jeddah  

Dream Divers conduct exit survey and ask about cleanliness. Tourists happy with old Jeddah (say it is much cleaner than other Zouks), but not that happy with beaches, creek.  

Survey through tour operators and hotels (LTO, PTO coordinates), exit survey in airport. SCT conducts regular surveys – include questions on littering  

Complaints:  

Survey in newspapers, through SCT call center (for information, free calls), internet  

Involve university Students  

Reason for the use of the shortlisted indicators: Tourists both produce waste and are often bothered by it. Heavy concentration of visitors on e.g. the corniche, the Old City or the Sharm bring a great deal of waste. Both actual quantities and perception of waste and cleanliness will affect tourism experiences.  

Source(s) of data: Agencies and or companies who collect solid waste. Disposal facility fees (if charged per tonne or per load) can be a source. Garbage counts done in key sites on a periodic basis can also serve as a suitable data collection process. Sampling (and waste audits) can be a good source. (see detail on specific sources for Jeddah in the above table)  

Means to use the indicators: These indicators will show whether or not waste is an issue, and if so whether or not it is affecting tourism sustainability (and if so in which markets.) Main clients would be the Supreme Commission for Tourism, the Provincial tourism office for Jeddah, the Municipality and tourist sector businesses who could help to stimulate action to control littering, help improve recycling practices. Destinations seeking to be perceived as “green” (e.g. India’s Nilgiri Hills where plastic bags and containers have been completely banned from the jurisdiction) use positive results as a form of advertising.  

Benchmarking: These are primarily performance measures to show progress over time in the same destination and specific sites as the mix of waste and its impact will be unique in each destination. It is however possible to benchmark tourist reaction to the statement “Jeddah was a clean place to visit” if this method of survey is used as it is recommended for widespread use among destinations.  

20. Issue: Managing Visual Impacts of Tourism Facilities/Infrastructure. (WTO 9.5)  

Both in the interview process and workshop, concern was raised that new development may be harming the aesthetics of Jeddah, the skyline, traditional house and building forms and vistas of the mountains. It was noted that much of the new construction of taller buildings did not follow the traditional styles. This is related to the issue 2.1 on maintenance of cultural heritage – particularly in the Old City, but also reflects the
impression by tourists of places such as Obhur Sharm or the Corniche – whether positive or negative.

**Indicator(s):**
- Height of new construction (average height, number over 2 stories)
- Percentage of new construction which matches local styles/vernacular
- % of tourists who agree that Jeddah has maintained its authentic village/regional style (exit questionnaire)

**Reason for the use of these indicators:** If design criteria are established to try to retain the ambience of Jeddah, particularly for sites such as the Old City or Obhur Sharm these become performance measures. The final indicator is a measure of tourist reaction – a measure of success in the eyes of the tourists.

**Source(s) of data:** Municipal records (the Jeddah Planning Commission monitors construction permits), environmental Protection Bureau, question in exit questionnaire. Note that some agreement will be needed on what styles are considered suitable – for the use of the indicator regarding local/vernacular architecture.

**Means to use the indicators:** General measure of the integrity of the image of Jeddah – can be used to prove authenticity of Jeddah for marketing

**Benchmarking:** Not easy to compare with other destinations as what constitutes local architecture varies greatly as do expectations. Jeddah is a mix of traditional and modern – and both images can be positive. Use this indicator to measure changes over time.

**21. ▲ Issue: Indicator(s): Controlling Use Intensity (WTO Baseline 10.1)**

Some sites in Jeddah are very crowded – the Sharm on Thursdays and Fridays, the Corniche, downtown markets at particular times. New development is also focused on the coastal areas and may contribute to further congestion.

- Intensity of use for key sites (number of tourists per Km$^2$ for key sites) (e.g., The Obhur Sharm – both road congestion on the shore and near Marinas and boat congestion in the water)
- Number of boats and personal watercraft per Km$^2$ in the Sharm
- Number of reported accidents (crashes, injuries) in boating in the Sharm
- % of tourists who found sites/Jeddah overcrowded (exit questionnaire)
- % of new hotel and other development in the immediate area of the Sharm and Corniche

**Reason for the use of these indicators:** While tourist numbers are a measure of success, excessive crowding can diminish the experience, cause safety problems, and diminished numbers or revenues if a site or destination is degraded. Some visitors may have their experience diminished by noise, crowding etc – particularly on weekends. Data may also help in decisions regarding density levels for new development in these congested areas.

**Source(s) of data:** Some data on total numbers is collected regarding boats for rent, numbers rented – by the rental locations. Crowd counts can be done for use intensity
and use levels (random and for peak days). Tourist reaction can be gauged by questions on the exit questionnaire.

**Means to use the indicators:** Key early warning measure for excessive crowding, impact, can stimulate mitigation measures (e.g., limits on numbers of rental craft, speed limits, quotas for numbers of buses or parking, control and scheduling) as well as design measures to reduce impacts such as provision of public transport, parking away from the congested sites with transportation etc.

**Benchmarking:** Can be compared among sites and over time. Some ability to compare to studies of use intensity in other jurisdictions based on their use of the same measures.

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**22. ▲ Issue: Integrating Tourism into Local/Regional Planning (WTO 11.1)**
Planning control and enforcement were among the issues which received the greatest attention in discussions and workshops. A key problem was seen as lack of coordination between agencies, and limited capacity to implement and enforce planning and development control. Although there is a recently defined Jeddah Tourism Development Plan, there is a need for site-specific development plans, such as the Obhur Sharm area, and for the definition of policy tools for the practical implementation of the plan. As well, participants identified the lack of a clear vision for tourism as part of a regional/local plan and the complexity of procedures across many agencies as barriers to sustainable development. Questions remain regarding what tourism future is wanted for Jeddah. Tourism is not well understood in all of the agencies/ministries which affect tourism and are affected by it. These factors impede actions to build on Jeddah’s strengths (e.g., excellent infrastructure, transportation) as a more comprehensive destination. At the level of Obhur Sharm, the issue is more concentrated, and there is a lack of a comprehensive site-management plan for the rapidly developing area.
**Indicator(s):**
- Presence of tourism in integrated regional plan/planning process (level of integration – subjective indicator)
- % of projects receiving thorough review (% of tourist projects)
- Number of violations of site plan control
- % of area subject to design control, density etc limits
- % of government officials who have received training in subject areas related to tourism and sustainability
- Number of offices and organizations participating in the planning process, frequency of consultations

**Reason for the use of these indicators:** Show that tourism is an important player in development for Jeddah. Authorities need to understand the extent to which their policies and programs make a difference. These indicators help measure the effects and effectiveness of programs designed to make tourism more sustainable. The last indicator is a measure of the degree to which officials (including those in key other departments and agencies) understand how their decisions relate to tourism.

**Source(s) of data:** From key departments – would likely require data gathering

**Means to use the indicators:** Mainly for internal government use to help define new needs and identify progress.

**Benchmarking:** Internal performance measure to show progress over time in more integrated planning and management of tourism. It is difficult to compare plans, although some comparison of contents can be done – usually as a one-time check relative to model comprehensive planning procedures.

23. ▲ Issue: Development Control (WTO Baseline 11.2)
Development of the Corniche, the Sharm and other areas of the coast is occurring rapidly. Concern has been expressed regarding the level of development control in place, the degree to which environmental or other impact reviews occur, and over problems of enforcement of regulations on land use, filling, design control etc particularly in shore zone. There are no setback requirements for new resorts. Lack of procedures for e.g. compensation for loss or impact, lack of clarity of regulations and inconsistent application and problems with level of land use planning and development control were all cited as remaining challenges. In particular, it was noted that landfills, piers, structures impeding navigation and onshore activity which may damage reefs seem to occur without control.

**Indicators:**
- % building proposals receiving environmental review
- Number of charges for violations of zoning laws

**Reason for the use of these indicators:** This is essentially an internal checklist for the planners of the destination to make certain that an appropriate plan is in place and enforced. Other measures such as number of enforcement officers can also be used to measure level of effort.
Source(s) of data: Internal data for key planning agency

Means to use the indicators: Internal performance measure

Benchmarking. Internal – as a performance measure showing progress

24. Issue: Lack of Tourist and Public Transport (WTO 11.3)
There is little accessible public transport to key tourist sites. As a consequence most visitors use their cars. This causes traffic jams in some areas (the Sharm, near the Old Town). There is little incentive to park some distance and take easy transport. While in some areas of the Corniche there are colourful carts and camels taking visitors for rides, these are not generally used for transport along the Corniche or access to specific sites.

Indicators:
• % of tourist use zones covered by public transport services
• % of tourists who use local public transport to visit sites
• % of travellers who believe that key tourism sites in Jeddah are easily accessible

Reason for the use of these indicators: Useful to identify demand for improvements in the transport system

Source(s) of data: Municipal authorities (and/or transport companies)

Means to use the indicators: Can be used as part of marketing – particularly to show access to variety (also see trip circuits below)

Benchmarking: Little now in place – can measure changes on baseline

25. Issue: Creating Trip Circuits and Routes (WTO 12.1)
A destination is a composite of many products. Cooperation is an important factor in successful sustainable destinations, where different attractions, accommodation, transport, and government agencies create linkages and joint products, which strengthen the destination. At this stage in its development, Jeddah lacks coordination and integration among those developing and promoting different assets. It is not easy to set up a planned tour or visit to several sites (e.g. Jeddah, diving, a traditional village, a market town) there is a lack of integrated tour product packaging, co-marketing of attractions and trips, coordination of activities so that tourists are encouraged to see and do more, and make it easy for them. There are no tour operators offering packaged programmes for visitors.

(see also Variety below)

Indicator(s):
• Length of stay of visitor (domestic, international)
• Number of different sites visited in/near Jeddah during the visit
• Number of packages available which feature more than one site or destination in Saudi Arabia or Mecca Province.
• Number of tour operators offering programmes and packaged tours
• Existence of marketing activities promoting multiple sites and activities in Jeddah (brochures, websites)
• (Note: tourist satisfaction can also be used)

**Reason for the use of these indicators:** Independent or package tourism is new to Jeddah. Little material exists to develop or promote multi-site/attraction packages.

**Source(s) of data:** SCT statistics, exit questionnaire

**Means to use the indicators:** Can help in getting collaboration in more cooperative marketing and sharing – part of marketing initiative.

**Benchmarking:** Use as time series

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**26. **Issue: Providing Variety of Experiences – Product Diversification (WTO Baseline12.2)

Except for transit visits en route to Mecca, Jeddah is a new emerging destination. Workshop participants noted that, relative to many other destinations there was a lack of social activities, programmes for visitors, lack of tour operators and packages, and a limited variety of products. Little had yet been done to pull the sector together to address issues related to marketing and promotion strategy and activities, to develop branding (for foreign and domestic tourists), to create an image for Jeddah tourism. These gaps are also reflected in the general paucity of tourist information (guides, maps), airport information, and trained service providers. A specific gap was noted as a lack of daytime facilities and activities for children (especially during festivals)

Diversification and differentiation of products is an important factor in the ability to market a destination, increase the length of stay and to retain return visitors. Tourist services (food, lodging, banks, medical services, etc.) can support both the needs of tourists and locals.

**Indicator(s):**
- Number of different types of attractions and activities in or near Jeddah (Number identified and marketed)
- Perception of variety by tourists (exit questionnaire) % of tourists who agree that Jeddah provided good variety
- Range of tourist services available
- Average length of stay by tourists
- % of return visitors

**Reason for the use of these indicators:** Variety is one of the main motivations for tourists to visit a site. Changes in the variety or how it is seen by tourists can affect the decision to come or to stay. The variety which does exist in and near Jeddah is not yet systematically identified and marketed effectively.

**Source(s) of data:** Exit questionnaire. Directory of tourist services and attractions
Means to use the indicators: Both a measure of changes to the product, and a source of information for marketing the variety of experiences.

Benchmarking: Not easy to compare with other destinations – use instead to measure progress within Jeddah. Comparison to perceptions of variety can be done with other destinations which use the same question on their exist surveys.

27. Issue: Protection of the Image of a Jeddah (WTO 12.4)
It may be fair to say that at present Jeddah lacks a comprehensive and well-defined image as tourism destination. Because tourism, the provincial and local tourism authorities are relatively new, there has been little attention to date to marketing and promotion. This presents an opportunity to address the image, branding and marketing of Jeddah comprehensively. This relates as well to the overall issue of tourism planning – deciding how many tourists, of what type, doing what, is desired for Jeddah. Branding (for foreign and domestic tourists), creates an image and is an important factor in influencing who comes, and why. Jeddah clearly has assets which will support a strong brand – images of old and new, of creative public art, of seaside vistas, of boating experiences, of superb food in exotic settings, all can be used to flavour the image of Jeddah.

The branding and marketing can significantly affect who comes, and how long they stay. As well, branding raises expectations. The image becomes the face of the destination – reflected in tourist information (guides, maps, brochures, recommended trips and routes). Once established, indicators measure the success of the image, and can also warn of threats to it.

Jeddah has extended open spaces, parks and squares with monuments
**Indicator(s):**
- % of tourists who have a positive image of Jeddah (exit questionnaire)
- % of tourists who would recommend Jeddah to their friends (exit Q)
- % of operators who perceive Jeddah to be safe, interesting, environmentally sound, good value destination (would need specific survey questions to address each of the elements promoted in the image)
- % of potential market who recognize Jeddah as a specific destination and who correctly identify its key assets (would need specific survey once key assets are defined in visioning)
- Image as portrayed in the print media and on websites

**Reason for the use of these indicators:** The decision to visit Jeddah and how long to stay is very often made with limited direct knowledge of Jeddah. Instead it is based on the image a person has of Jeddah – obtained from books, brochures, recommendations of friends, and travel agents. If tourists who leave have a positive image they may tell friends, decide to return, maybe stay longer, perhaps return to see other sites nearby which they did not get to visit. If the destination is widely known to be varied, interesting, high quality etc., it is more likely to be chosen as the place to visit, and to visit for a longer period to take advantage of all of the attractions and amenities. As well, the positioning of specific images will affect who visits. Strong emphasis on traditional culture and food will tend to attract those interested in local culture and cuisine. Strong emphasis on diving and pictures of sea life will attract divers.

**Source(s) of data:** These data can only be obtained via surveys – the exit survey recommended for many of these opinion-based questions, and a specific survey of travel agents and inbound operators (and/or potential tourists in key markets). For a less expensive surrogate indicator it could be useful to do a review of recent tourist publications and websites to assess what image (if any) Jeddah receives. It would be premature to do such surveys until the overall vision and strategy is in place, although an initial survey might help establish current image.

**Means to use the indicators:** This is essentially a management indicator – showing current perception and may lead to actions to change that perception or to better brand Jeddah.

**Benchmarking:** Not yet pertinent; could be useful once strategy is decided – to compare with destinations with similar strategies/focus.

If Jeddah wishes to brand itself as a sustainable tourism destination, it will be important to be able to show progress in the management of the ecological footprint of hotels and resorts as well as any other major components of the tourism sector. This means attention to policies and environmental programs - Environmental Management Systems, certifications and monitoring programs – both at the destination and enterprise levels. In many destinations worldwide, hotels and resorts are being encouraged to seek and maintain environmental certifications. There is emerging evidence that there are some benefits to those establishments who have environmental management systems in place – in cost reductions, in image (many tourists tend to equate sound environmental
management with cleanliness and quality) and in overall occupancy. PME has an office overviewing Environmental Impact Assessment (EIA) processes, but the implementation and control of these measures is difficult.

**Indicator(s):**
- % of establishments with formal certification (e.g. ISO 14000, EMS, HACCP or similar)
- % staff trained in environmental responsibility
- % of establishments using of key environmentally sensitive technologies (e.g. energy conservation, water savings, waste recycling)
- % of new constructions went through and complied with EIA requirements

**Reason for the use of these indicators:** These measure progress in obtaining buy-in and action by the private sector

**Source(s) of data:** Municipal authorities or Hotel/resort associations (or the certifying bodies)

**Means to use the indicators:** Showcase compliance. (e.g. over 60% of our hotels now have recycling programs” or “ more than half of all rooms are now in properties with environmental policies and EMS”). This can provide some differentiation with other destinations and can imply quality.

**Benchmarking:** Many destinations and hotel chains post their level of achievement of EMS or ISO on their websites. Others (e.g. Sustainable tourism zone for the Caribbean) post standards they see as long term goals – such as 80% by 2009 etc.
Annex A: Model Questionnaire on Satisfaction of Local Community applied to Jeddah

Please indicate your opinion on each of the following questions.

<table>
<thead>
<tr>
<th>Question</th>
<th>1 Strongly Disagree</th>
<th>2 Disagree</th>
<th>3 Neutral</th>
<th>4 Agree</th>
<th>5 Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Tourism is good for Jeddah</td>
<td></td>
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</tr>
<tr>
<td>B) I personally benefit from the tourism industry</td>
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<tr>
<td>C) Tourism in my community/region has the following effects: (bulleted below):</td>
<td></td>
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<tr>
<td>• creates jobs for local residents</td>
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<tr>
<td>• employs local youth</td>
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<tr>
<td>• raises prices for goods</td>
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<tr>
<td>• helps the community obtain services</td>
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<td>• causes rise in crime rates</td>
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<tr>
<td>• harms moral standards</td>
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<td>• harms the environment</td>
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<td>• violates community traditions</td>
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<tr>
<td>• helps stimulate local culture and crafts</td>
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<tr>
<td>• uses natural resources needed by local residents (e.g., fish, game, water etc)</td>
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<tr>
<td>D) My community has control over tourism</td>
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<tr>
<td>E) The money spent by tourists remains in my community</td>
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<tr>
<td>F) Local residents have easy access to the areas which tourists use</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>G) I am personally affected by tourism by:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>• Working in tourism</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>• Selling goods to tourists</td>
<td></td>
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<tr>
<td>• Having to speak to tourists regularly</td>
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<tr>
<td>• Tourists bothering me while I work/play</td>
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<tr>
<td>• Tourism is growing too fast</td>
<td></td>
<td></td>
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<tr>
<td>• I am satisfied with my ability to participate in development planning for Jeddah</td>
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</tr>
</tbody>
</table>

(others can be added as appropriate) – to address new issues or to elaborate on specific ones (e.g. for tourism industry employees only - I feel secure in my job” or “tourism helps me obtain new skills”)
Overall, what is your opinion of the tourism in your community?
Very Unsatisfactory-------Poor------------ Satisfactory --------Good------------ Excellent

Would you want more or less tourism in future in your community or region?
Much Less-------------Less-------------Same----------More---------Much More

What is your main concern regarding tourism in your community?
_____________________________________________________________________________
_____________________________________________________________________________

What could be done to improve tourism in your community?
_____________________________________________________________________________
_____________________________________________________________________________

What kind of tourists would be most welcome in your community?
_____________________________________________________________________________

Comments___________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________

Note 1: Where specific additional issues or concerns are known, a question in the above formats could be added. The question can respond to the issues raised in the community or identified through participatory processes. Such issues can be very specific to a destination or even a particular site (too much noise at night, loss of access to the beach, lack of control of trespassing by hikers, fear of loss of job, concern over worker housing). Care needs to be taken to not add too many questions – as excessively long questionnaires may be seen as a burden and can reduce response rates.

Note 2: It may be useful to collect some information about the respondent – do this at the end. Suggested data could include: gender, length of time resident in community, occupation, place of residence in the destination, whether or not they are employed by the tourism industry. Take care with any questions about age, income, ethnicity, religion or social class as these can be considered offensive and may even be illegal to ask in some jurisdictions.
Annex B: Model Questionnaire on Satisfaction of Tourists applied to Jeddah

Why did you visit JEDDAH?

<table>
<thead>
<tr>
<th>Question</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this your first visit?</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Please respond to the following questions with the appropriate answer:</td>
<td>Strongly Agree</td>
<td>Agree</td>
<td>Neutral</td>
<td>Disagree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>a) I enjoyed my experience in Jeddah</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>b) I found access to/from Jeddah to be good</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>c) I found Jeddah to be clean</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>d) I found enough to do in Jeddah</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>e) The tourist sites were not too crowded</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>f) I had a good experience involving the local culture</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>g) It was easy to arrange my trip to Jeddah</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>h) The scenic places were clean and pleasant</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>i) I was able to buy good souvenirs and artefacts</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>j) I had good opportunities to enjoy local cuisine</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>k) I feel I received good value for money</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>l) I would recommend a visit to Jeddah to my friends</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>m) I felt safe while in Jeddah</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>n) I will return again to Jeddah</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

What would cause you to visit Jeddah outside the peak summer or Hajj seasons?

Were there any activities which you expected to find in Jeddah which were missing?

Comments re any of the above answers:

What could be done to improve your vacation next time in Jeddah?

Date:_________ Nationality of tourist_______________ Hotel stayed__________________________
### Annex C: Indicator Selection Worksheet
*(with an example on the issue of Solid Waste Management in Jeddah)*

<table>
<thead>
<tr>
<th>ISSUE</th>
<th>CANDIDATE MEASURES (Specific indicators)</th>
<th>Rating/ (as compiled for this issue in the workshop session)</th>
<th>RELEVANCE</th>
<th>FEASIBILITY</th>
<th>PROSPECTIVE USE (clarity and credibility)</th>
<th>BENCHMARKING</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample: Issue Solid Waste Management</td>
<td>Amount of garbage collected (kg per day, per month), specified from hotels and tourist facilities (% of total)</td>
<td></td>
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<tr>
<td></td>
<td>Amount of garbage thrown away in beaches, corniche and other public areas (kg/tonne per day, week)</td>
<td>User: Municipality, City Council, Use: calculate garbage collection services, allocation of workers, trucks, relocate them to places more needed, allocation of garbage collection capacities, scheduling of collection services</td>
<td>Municipality registry data: number of trucks, weight Part of it is collected by individuals and recycled to factories(cans, paper picked up) , before collected by municipality Garbage from ground and container is collected together. Needs sampling on litter on ground- collectors to weight garbage collected from ground before throwing to truck – ration of garbage from container compared to littering Observation, garbage counting in sample areas University help in research</td>
<td>Needs to be added info on garbage picked up by individuals, difficult to define from which area garbage come from Resulting information can be easy to understand if portrayed in tonnes or volumes per surface area</td>
<td>Info on total waste collected available since about 10 years, when municipality started to contract collection and recycling services</td>
<td></td>
<td>Retain as indicator</td>
</tr>
<tr>
<td></td>
<td>In key areas: amount of garbage per square meter, km</td>
<td>Evaluate results of awareness raising and cleanup campaigns</td>
<td></td>
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<tr>
<td></td>
<td>Amount of litter on sea bottom</td>
<td>Can be critical to intensively used and confined areas, such as the Sharm, as it can affect water quality and marine life, as well as image.</td>
<td>Marine College, Dream Divers, Saudi Geological Survey, Saudi Aramco are potential data sources</td>
<td>Surveys, through underwater photography in sample areas provides a clear an visual information to both technical and non-technical users. The amount of garbage collected is also an indicator that can be understood easily.</td>
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<td></td>
</tr>
<tr>
<td>ISSUE</td>
<td>CANDIDATE MEASURES (Specific indicators)</td>
<td>Rating/ (as compiled for this issue in the workshop session)</td>
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</tr>
<tr>
<td></td>
<td>RELEVANCE</td>
<td>FEASIBILITY</td>
<td>PROSPECTIVE USE (clarity and credibility)</td>
<td>BENCHMARKING</td>
<td>Comments</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Amount, % of waste recycled</td>
<td>Municipality needs information to calculate need for contracting cleaning and recycling services. It is an indication on waste reduction. Municipality saves money on cleaning and waste treatment services, if recycling is done more efficiently.</td>
<td>From recycling companies, have information per types of waste, might be difficult to define source (from individual collectors, from supermarkets), municipality can coordinate with recycling factory to get data. PME can help in this</td>
<td>Can be used to show progress – image as &quot;clean&quot; destination</td>
<td>Can be done over time. Other destinations and facilities under e.g. Green Globe 21, International Hotels Environmental initiative collect these data</td>
<td>Work with industry to establish program. Introduce regulation for supermarkets, hotels to separate waste and transport it to collection points</td>
<td></td>
</tr>
</tbody>
</table>

**Indicators Selection Worksheet - Notes for use:**

**Selection of promising indicators:** Initially, all possible means of measuring are considered. This sheet is designed to help in discussion of what is likely to be a good indicator in the particular destination and in response to each of the priority issues. Note that a general discussion is done regarding the issue area and candidate indicators. The key criterion is the first – that is: is the indicator relevant (i.e., is it useful to the tourism industry and its partners to help resolve or manage the issue – how will it help and who will use it?) If the discussion concludes that it is likely to be very useful, the other criteria are considered.

Based on the discussion, it may be useful to use a shorthand for each criterion: for example the symbols H (high) M (medium) or L (low) can be assigned for each potential measure (WTO specific indicator – on a chart, wallboard etc to help in an overview of all potential indicators). Users may wish to discuss the relative ratings of each measure which could respond to an indicator requirement (WTO issue). Those agreed to be most useful (likely with high ratings against all criteria) will go forward to more detailed evaluation in the next phase: the best of these will ultimately be implemented. The overall objective is to identify a short list of useful and practical indicators which are critical indicator/measures for the issue in question and the management of the site/destination, and important for management decisions which the tourism sector takes or influences.
Annex D: Indicators Development and Reporting Worksheet
(with an example on the issue of lack of tourist information in Jeddah)

**Indicators Development and Reporting Worksheet**

(This form is designed to help define each indicator chosen and to document characteristics and methods of use, as well as to define actions in the sustainability issue in question. This example shows the worksheet as used to stimulate discussion of one specific indicator and the logistics of implementation for Jeddah.)

1. **Issue or risk to which the indicator responds (brief description):**
   Lack of tourist information (insufficient availability and access to suitable information)

2. **Indicator (include precise statement of indicator)**
   *Number and types of information outlets for tourism information in Jeddah, (e.g. through SCT, Bookstores, airport office, hotels, hotlines, websites, etc.).*  
   Recommendation: Collect at same time information on the use of these information channels:
   - Number of tourists using information outlets
   - Tourist’s satisfaction with the quantity and quality of information provided – include in exit surveys

Data source(s):
*Municipality conducted survey (4 years ago, plans to repeat it bi-annually), SCT conducts survey or compiles information from Chamber of Commerce*
*Recommendation: SCT to coordinate with Municipality on joint surveys and evaluations*

Precise method of calculation:
*Audit based on observation, survey among tourist businesses, through calls, mystery shoppers (surveyor acting as client and inquiring tourist information to check availability and quality from the tourists’ pint of view)*

Intended users:
*Municipality, SCT, tourism businesses, developers and investors*

3. **Logistics of indicators production:**

Who will gather and process the data and information?
*Municipality in coordination with SCT*

Who will compile the indicator and prepare for reporting?
*SCT database, survey on tourism businesses, Municipal information center being re-organized.*
*Suggestion: SCT and Municipality develops a joint data-base*
Frequency of production:
Yearly surveys, every half a year update through phone calls (SCT), Municipality suggests every 2 years (to be defined by SCT and Municipality jointly, it can vary by types of tourist information outlet, depending on possibilities for data collection)

Time needed between data collection and production/use of the indicator: (e.g., is data released only annually or can it be obtained and used immediately?)
SCT does real time data gathering and publication through data entered to database, available immediately on-line, linked with directories (also available for tourists)

Confidentiality considerations:
None noted, but some entrepreneurs may be reluctant to release sales of distribution data, unless treated confidentially

Form of reporting (specific tables, graphs, etc to be produced, reporting in brochures, reports, website, etc.)
Report by types of information channels and outlets. Graphs can be used to demonstrate time series. It can form part of periodic evaluations and progress reports on the implementation of the Jeddah Tourism Development Plan. Results of these indicators can be included in brochures and information material aiming at investors as developers. A list of information sources can be included in tourist brochures and websites.

Costs, staff and technical facility needed for data gathering and processing. Cost of communication and publication of data:
To be defined. SCT and Municipality can discuss how to share costs, staff, technical support needed.

Difficulties expected in data gathering and processing, and possibilities to improve:
Need to coordinate activities among current collectors of data and to cooperate in creating an efficient gathering process which satisfies all users.

Observed trends to date:
Comprehensive baseline information with inventory of existing information channels and outlets needs to be set up.

Benchmarking (comparison with similar destinations) Is there any specific standard, other destination, or guideline which will be used for comparison. (If available, how do the observed trends compare?)
None at this time – there is a good possibility to use the same measures for other Saudi destinations.

Desired trends, objectives (clearly defined), standards or thresholds to be met:
The objective is to diversify the tourist information sources and outlets and enhance the information content and quality. This will be key for the marketing strategy of Jeddah and for reaching a greater recognition Jeddah as a tourism destination.
Actions taken so far (results), existing regulations, policies or references:
The Jeddah Tourism Development Plan, in its Chapter 11 dedicated to Tourist Information Services, outlines a strategy and basic references to improve the provision of tourist information.

Expected actions (including plans to improve information collection and analysis, if necessary):

Discussions to occur among SCT, Jeddah Municipality and other relevant stakeholders to establish a joint procedure for regular data gathering, analysis and reporting on this issue.

The Jeddah Tourism Development Plan suggests the establishment of Tourist Information Centers (TIC) at the main gateways and tourist areas (e.g. airport, coastal zone, Old Town), supported by a network of tourist information points and signs, as well as developing specific websites and mobile information services.

Note: this worksheet was used in the final plenary session to demonstrate the key questions which need to be addressed in making each indicator functional. The indicator chosen was one suggested by the group. The session revealed that at least two different organizations were involved at present in collecting information which could help support this indicator, should it be decided to implement it. It also highlighted the need to use more than one indicator to address an issue such as insufficient understanding/image recognition for Jeddah.
Annex E: UNWTO Baseline Issues and Indicators of Sustainable Tourism

Excerpt from the Guidebook on Indicators of Sustainable Development for Tourism Destinations (UNWTO, 2004)

The baseline issues and indicators contained in the table below can be considered as the most common and useful ones in tourism destinations. These have been selected from around 50 sustainability issues and more than 500 indicators described in the UNWTO Indicators Guidebook. While this list is put forward as a short list of useful indicators extracted from the Guidebook, users are urged to adapt them to the specific conditions and needs of the destinations, tourism planning, management and research processes they work in. Some would argue that other issues and indicators should also be on the short list – issues such as health, security, environmental protection, and employment with their corresponding indicators. As a consequence, users are urged to consider the importance of all the issues in the list, as well as those which are perhaps unique to their destination before settling on a final list for implementation in their destination.

<table>
<thead>
<tr>
<th>Baseline Issue</th>
<th>Suggested Baseline Indicator(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCAL SATISFACTION WITH TOURISM</td>
<td>►Local satisfaction level with tourism (Questionnaire)</td>
</tr>
<tr>
<td>EFFECTS OF TOURISM ON COMMUNITIES</td>
<td>►Ratio of tourists to locals (average and peak period/days)</td>
</tr>
<tr>
<td></td>
<td>►% who believes that tourism has helped bring new services or infrastructure. (questionnaire-based)</td>
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<tr>
<td></td>
<td>►Number and capacity of social services available to the community (% which are attributable to tourism)</td>
</tr>
<tr>
<td>SUSTAINING TOURIST SATISFACTION</td>
<td>►Level of satisfaction by visitors (questionnaire-based)</td>
</tr>
<tr>
<td></td>
<td>►Perception of value for money (questionnaire-based)</td>
</tr>
<tr>
<td></td>
<td>►Percentage of return visitors</td>
</tr>
<tr>
<td>TOURISM SEASONALITY</td>
<td>►Tourist arrivals by month or quarter (distribution throughout the year)</td>
</tr>
<tr>
<td></td>
<td>►Occupancy rates for licensed (official) accommodation by month (peak periods relative to low season) and % of all occupancy in peak quarter or month</td>
</tr>
<tr>
<td></td>
<td>►% of business establishments open all year</td>
</tr>
<tr>
<td></td>
<td>►Number and % of tourist industry jobs which are permanent or full-year (compared to temporary jobs)</td>
</tr>
<tr>
<td>ECONOMIC BENEFITS OF TOURISM</td>
<td>►Number of local people (and ratio of men to women) employed in tourism (also ratio of tourism employment to total employment)</td>
</tr>
<tr>
<td></td>
<td>►Revenues generated by tourism as % of total revenues generated in the community</td>
</tr>
<tr>
<td>Category</td>
<td>Indicators</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>ENERGY MANAGEMENT</strong></td>
<td>► Per capita consumption of energy from all sources (overall, and by tourist sector – per person day)</td>
</tr>
<tr>
<td></td>
<td>► Percentage of businesses participating in energy conservation programs, or applying energy saving policy and techniques</td>
</tr>
<tr>
<td></td>
<td>► % of energy consumption from renewable resources (at destinations, establishments)</td>
</tr>
<tr>
<td><strong>WATER AVAILABILITY AND CONSERVATION</strong></td>
<td>► Water use: (total volume consumed and litres per tourist per day)</td>
</tr>
<tr>
<td></td>
<td>► Water saving (% reduced, recaptured or recycled)</td>
</tr>
<tr>
<td><strong>DRINKING WATER QUALITY</strong></td>
<td>► Percentage of tourism establishments with water treated to international potable standards.</td>
</tr>
<tr>
<td></td>
<td>► Frequency of water-borne diseases: number/percentage of visitors reporting water-borne illnesses during their stay</td>
</tr>
<tr>
<td><strong>SEWAGE TREATMENT (WASTEWATER MANAGEMENT)</strong></td>
<td>► Percentage of sewage from site receiving treatment (to primary, secondary, tertiary levels)</td>
</tr>
<tr>
<td></td>
<td>► Percentage of tourism establishments (or accommodation) on treatment system(s)</td>
</tr>
<tr>
<td><strong>SOLID WASTE MANAGEMENT (GARBAGE)</strong></td>
<td>► Waste volume produced by the destination (tonnes) (by month)</td>
</tr>
<tr>
<td></td>
<td>► Volume of waste recycled (m$^3$) / Total volume of waste (m$^3$) (specify by different types)</td>
</tr>
<tr>
<td></td>
<td>► Quantity of waste strewn in public areas (garbage counts)</td>
</tr>
<tr>
<td><strong>DEVELOPMENT CONTROL</strong></td>
<td>► Existence of a land use or development planning process, including tourism</td>
</tr>
<tr>
<td></td>
<td>► % of area subject to control (density, design, etc.)</td>
</tr>
<tr>
<td><strong>CONTROLLING USE INTENSITY</strong></td>
<td>► Total number of tourist arrivals (mean, monthly, peak periods)</td>
</tr>
<tr>
<td></td>
<td>► Number of tourists per square metre of the site (e.g., at beaches, attractions), per square kilometre of the destination, - mean number/peak period average</td>
</tr>
</tbody>
</table>
Annex F: Seminar and Workshop Programme, list of presentations and speakers

Seminar on Tourism Sustainability and Local Agenda 21 in Tourism Destinations and
Workshop on Sustainability Indicators for Tourism Destinations

Jeddah, Saudi Arabia
18-22 February 2005

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>17:00 - 21:00</td>
<td>Registration and document distribution</td>
<td></td>
</tr>
<tr>
<td>21:00 - 23:00</td>
<td>Dinner and Reception</td>
<td></td>
</tr>
</tbody>
</table>

**Saturday, 18 February**

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>00 - 09:30</td>
<td><strong>Opening Session</strong></td>
<td>Dr. Khalid Ibrahim AL-DAKHIL&lt;br&gt;Assistant for Secretary General&lt;br&gt;The Supreme Commission for Tourism&lt;br&gt;Kingdom of Saudi Arabia&lt;br&gt;Mr. Amr ABDEL-GHAFFAR&lt;br&gt;Regional Representative for the Middle East&lt;br&gt;World Tourism Organization&lt;br&gt;H.E. Mr. Joseph Malwal DONG&lt;br&gt;Minister of Tourism and Wildlife of Sudan</td>
</tr>
<tr>
<td>09:30 - 09:40</td>
<td>Document film about cultural tourism in Saudi Arabia</td>
<td>Moderator&lt;br&gt;Dr. Faisal Al-Mubarak&lt;br&gt;Assistant Deputy Secretary General&lt;br&gt;Strategic Planning and Monitoring&lt;br&gt;The Supreme Commission for Tourism&lt;br&gt;Kingdom of Saudi Arabia</td>
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<tr>
<th>Time</th>
<th>Topic</th>
<th>Speakers</th>
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<tr>
<td>09:40 - 17:00</td>
<td><strong>Session I: Tourism and Sustainability</strong></td>
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<td>Time</td>
<td>Session</td>
<td>Speaker</td>
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| 09:40 - 10:30 | Tourism and Sustainable Development: the current imperatives | Mr. Eugenio YUNIS  
(Head, Sustainable Development of Tourism Department  
World Tourism Organization) |  |
|          | Objectives, policies and tools for sustainable tourism | Dr. Richard DENMAN  
(UNWTO Expert) |  |
| 10:30 - 11:00 | Discussion |  |  |
| 11:00 - 11:30 | Break |  |  |
| **Session II: Governance in tourism: the importance of decentralization** | **Moderator**  
Dr. Waleed Kassab Al-Hemaidi  
(Assistant Deputy Secretary General  
Tourism Sites Development  
The Supreme Commission for Tourism  
Kingdom of Saudi Arabia) |  |  |
| 11:30 - 13:00 | Sustainable tourism policies, strategies and plans at the different levels | Mr. Gabor VERECZI  
(Programme Officer, Sustainable Development of Tourism Department  
World Tourism Organization) |  |
| **Case study presentations:** |  |  |  |
| - The national tourism policy framework and the decentralization process of tourism development in Jordan | Mrs. Abeer Ahmed AL SAHEB  
(Director of Planning  
Ministry of Tourism and Antiquities  
Jordan) |  |  |
| - The Red Sea Sustainable Tourism Initiative (RASSTI) in Egypt | Dr. Mohamed Mahmoud M. HASSANEIN  
(General Manager  
Tourism Development Authority (TDA)  
Egypt) |  |  |
| - Tourism Policies in Tunisia | Mr. Mouldi MHEDBI  
(Chief of Minister’s Cabinet  
Ministry of Tourism and Handicraft  
Tunisia) |  |  |
| 13:00 - 14:30 | Lunch |  |  |
| **Continuation of Session II:** |  |  |  |
| 14:30 - 15:30 | Strategy for the Development of Rural Tourism in Morocco | Mr. Moha ER-RICH  
(Project Director, Engineer, Development and Investment Department  
Ministry of Tourism, Handicraft and Social Economy) |  |
<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>15:30 - 16:00</td>
<td>Discussion</td>
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<td>16:00 - 16:15</td>
<td>Break</td>
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<tr>
<td>16:15 - 17:30</td>
<td><strong>Session III: Local Agenda 21 and Tourism</strong></td>
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<tr>
<td></td>
<td><strong>Moderator</strong></td>
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<tr>
<td></td>
<td>Dr. Khalid Abulgader Taher</td>
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<td></td>
<td>Director of Provincial Liaison and Support Department (PLSD)</td>
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<td>The Supreme Commission for Tourism</td>
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<td>Kingdom of Saudi Arabia</td>
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<td></td>
<td><strong>Implementing sustainable tourism at the local level</strong></td>
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<td></td>
<td>Presentation on behalf of</td>
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<tr>
<td></td>
<td>Mr. Wolfgang TEUBNER</td>
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<tr>
<td></td>
<td>Executive Director</td>
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<td></td>
<td>International Council for Local Environmental Initiatives (ICLEI)</td>
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<td></td>
<td><strong>Examples from around the World</strong></td>
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<tr>
<td></td>
<td>Mr. Gabor VERECZI</td>
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<td></td>
<td>Programme Officer, Sustainable Development of Tourism Department</td>
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<td></td>
<td>World Tourism Organization</td>
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<tr>
<td></td>
<td>Dr. Richard DENMAN</td>
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<tr>
<td></td>
<td>UNWTO Expert</td>
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<td><strong>Examples from the Middle East:</strong></td>
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<tr>
<td></td>
<td><strong>Local Tourism Development in Jerash</strong></td>
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<tr>
<td></td>
<td>Mrs. Abeer Ahmed AL SAHEB</td>
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<td></td>
<td>Director of Planning</td>
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<td></td>
<td>Ministry of Tourism and Antiquities</td>
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<td></td>
<td>And</td>
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<tr>
<td></td>
<td>Mr. Khaled Omar Husein AL SHBOUL</td>
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<tr>
<td></td>
<td>Director of Jerash Tourism Directorate</td>
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<td>Ministry of Tourism and Antiquities</td>
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<td></td>
<td>Jordan</td>
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<td>17:30 - 18:00</td>
<td><strong>Discussions, conclusion and recommendations</strong></td>
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<tr>
<td></td>
<td>Mr. Eugenio YUNIS</td>
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<tr>
<td></td>
<td>Head, Sustainable Development of Tourism Department</td>
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<td></td>
<td>World Tourism Organization</td>
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<tr>
<td>20:30</td>
<td><strong>Dinner at the Dive Center and on Cruise</strong></td>
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</table>
WORKSHOP ON SUSTAINABILITY INDICATORS FOR TOURISM DESTINATIONS

**Monday, 20 February**

<table>
<thead>
<tr>
<th>Time</th>
<th>Plenary sessions:</th>
<th>Speakers</th>
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</table>
| 09:00 - 10:30 | Introduction to the application of sustainable tourism indicators: UNWTO methodology and experiences from different destinations | Mr. Gabor VERECZI  
Programme Officer, Sustainable Development of Tourism Department  
World Tourism Organization  
Dr. Ted MANNING  
UNWTO Lead Expert on Sustainable Tourism Indicators |
| 10:30 - 11:00 | **Break**                                                                         |                                                                          |
| 11:00 - 12:30 | Introduction to tourism at Obhur, Jeddah (familiarization of participants with the case study destination) | Mr. Abdullah Salman AL-JEHANI  
Executive Manager  
Provincial Tourism Office of Mecca  
Eng. Emad AL-BUKHARI  
Municipal Director of Obhur  
Mr. Abdullah Alsuhibani, PERSGA  
Dr. Dherar Hassan, PERSGA  
Dr. Ali BASHEM  
College of Marine Sciences |
| 12:30 - 14:00 | **Lunch**                                                                         |                                                                          |
| 14:30 - 17:00 | **Field visits:** Technical visits to the case study destination (Obhur, Jeddah) and its tourist sites, discussions with local representatives |                                                                          |
| 20:00       | **Dinner**                                                                        |                                                                          |
**Tuesday, 21 February**

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<thead>
<tr>
<th>Time</th>
<th>Plenary sessions:</th>
<th>Speakers</th>
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<tbody>
<tr>
<td>09:00 - 12:00</td>
<td><strong>Field visits:</strong> Continuation of technical visits and discussions with local representatives</td>
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<td>12:00 - 13:30</td>
<td><strong>Lunch</strong></td>
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<td>13:30 - 16:30</td>
<td><strong>Working group sessions on the application of indicators:</strong> Identification of key issues and problems, as well as opportunities and solutions to advance towards a more sustainable tourism in Obhur, Jeddah (introductory presentation in plenary, followed by working groups in small rooms)</td>
<td><strong>Moderators for the working groups and plenary discussions:</strong> Mr. Gabor VERECZI Programme Officer, Sustainable Development of Tourism Department World Tourism Organization Dr. Ted MANNING UNWTO Lead Expert on Sustainable Tourism Indicators Dr. Richard DENMAN UNWTO Expert</td>
</tr>
<tr>
<td>16:30 - 17:00</td>
<td><strong>Break</strong></td>
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<td>17:00 – 17:30</td>
<td>Reports of working group results to plenary session</td>
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<td>20:30</td>
<td><strong>Dinner</strong></td>
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### Wednesday, 22 February

<table>
<thead>
<tr>
<th>Time</th>
<th>Plenary sessions:</th>
<th>Speakers</th>
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<tbody>
<tr>
<td>09:00 - 12:00</td>
<td><strong>Working group sessions on the application of indicators:</strong></td>
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<td></td>
<td>(Introduction in plenary followed by working groups)</td>
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<td></td>
<td>Identification of indicators and measurement methodologies to monitor tourism</td>
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<td>planning and management processes</td>
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<td>10:30 - 10:45</td>
<td>Break</td>
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<tr>
<td>12:15 - 13:30</td>
<td>Lunch</td>
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<tr>
<td>13:30 - 14:30</td>
<td>Reports of working group results to plenary session</td>
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<td>14:30 - 16:00</td>
<td>Recommendations for further research and application of sustainability indicators</td>
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<td></td>
<td>as well as actions for sustainable tourism in Obhur, Jeddah</td>
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<tr>
<td>16:00 – 16:30</td>
<td>Break</td>
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<td>16:30 - 17:30</td>
<td>Application of the indicators process and workshop methodology in other countries and destinations of the region.</td>
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<tr>
<td>17:30 - 18:00</td>
<td><strong>Closing remarks</strong></td>
<td>Mr. Gabor VERECZI</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Programme Officer, Sustainable Development of Tourism Department</td>
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<td></td>
<td></td>
<td>World Tourism Organization</td>
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<td></td>
<td></td>
<td>Eng. Mohammad A. ALNASHMI</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Consultant</td>
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<td></td>
<td></td>
<td>Planning and Monitoring Department</td>
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<td>The Supreme Commission for Tourism</td>
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<td>Kingdom of Saudi Arabia</td>
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</table>
Annex G: list of participants

SEMINAR ON TOURISM SUSTAINABILITY AND LOCAL AGENDA 21 IN TOURISM DESTINATIONS AND WORKSHOP ON SUSTAINABILITY INDICATORS FOR TOURISM DESTINATIONS

LIST OF PARTICIPANTS

I. UNWTO FULL MEMBERS / الدول كاملة العضوية في منظمة السياحة العالمية

<table>
<thead>
<tr>
<th>ALGERIA / الجزائر</th>
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<tbody>
<tr>
<td>Mr. Noureddine Ahmed SAYED</td>
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<td>Fax 213 21 792601</td>
</tr>
<tr>
<td>Deputy Director</td>
<td>Ministry of Tourism</td>
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<table>
<thead>
<tr>
<th>BAHRAIN / البحرين</th>
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<tbody>
<tr>
<td>Mr. Abdulaziz Mohamed ALRAFAEI</td>
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<td></td>
</tr>
<tr>
<td>Assistant Undersecretary for Tourism Affairs</td>
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<td></td>
</tr>
<tr>
<td>Ministry of Information</td>
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<td></td>
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<tr>
<th>EGYPT / مصر</th>
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<tbody>
<tr>
<td>Dr. Mohamed Mahmoud M. HASSANEIN</td>
<td>Tel. 20 123957059</td>
<td></td>
</tr>
<tr>
<td>General Manager</td>
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<td></td>
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<td>Tourism development Authority (TDA)</td>
<td>E-mail <a href="mailto:hassanein62000@yahoo.com">hassanein62000@yahoo.com</a></td>
<td></td>
</tr>
<tr>
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<td>Tel. 20 2 7483313/7608487</td>
<td></td>
</tr>
<tr>
<td>General Manager</td>
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<td></td>
</tr>
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<tr>
<th>JORDAN / الأردن</th>
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<tr>
<td>Mrs. Abeer Ahmed AL SAHEB</td>
<td>Tel. 962 795623542</td>
<td></td>
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<tr>
<td>Director of Planning</td>
<td>Fax 962 4 614448</td>
<td></td>
</tr>
<tr>
<td>Ministry of Tourism and Antiquities</td>
<td>E-mail <a href="mailto:abeer.s@mota.gov.jo">abeer.s@mota.gov.jo</a></td>
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<tr>
<td>Mr. Khaled Omar Husein AL SHBOUL</td>
<td>Tel. 962 795414193</td>
<td></td>
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<tr>
<td>Director of Jerash Tourism Directorate</td>
<td>Fax 962 2 6351272</td>
<td></td>
</tr>
<tr>
<td>Ministry of Tourism and Antiquities</td>
<td>E-mail <a href="mailto:eng-alzoubi@yahoo.com">eng-alzoubi@yahoo.com</a></td>
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</tr>
<tr>
<td>Country</td>
<td>Name</td>
<td>Title</td>
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<tr>
<td>Kuwait</td>
<td>Mr. Mohamed AL-SHEMARI</td>
<td>Research and Information Director</td>
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<tr>
<td></td>
<td>Mr. Faisal AL-DURAIIE</td>
<td>Touristic Events Controller</td>
</tr>
<tr>
<td>Lebanon</td>
<td>Eng. Joumana KABRIT</td>
<td>Director of Research and Studies Department</td>
</tr>
<tr>
<td>Mauritania</td>
<td>Mr. Hamzette Ould Sidi Hamoud</td>
<td>Ministry of Trade, Handicrafts and Tourism</td>
</tr>
<tr>
<td>Morocco</td>
<td>Mr. Moha ER-RICH</td>
<td>Engineer, Development and Investment</td>
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<tr>
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<td></td>
<td>Department</td>
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<td>Ministry of Tourism, Handicraft and Social</td>
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<td>Economy</td>
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<tr>
<td>Qatar</td>
<td>Mr. Jan Paul DE BOER</td>
<td>Acting Director General</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>Dr. Khalid Ibrahim AL-DAKHIL</td>
<td>Assistant for Secretary General</td>
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<td></td>
<td>Dr. Faisal AL-MUBARAK</td>
<td>Assistant Deputy Secretary General</td>
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<td>Dr. Waleed Kassab AL-HEMAIDI</td>
<td>Assistant Deputy Secretary-General</td>
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</table>
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Mr. Abdelaziz Mohamed MABROUK  
Consulate of Sudan in Jeddah

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Fort Guide Cel. 968 99378942  
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Ministry of Tourism and Handicraft

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Ministry of Tourism and Handicraft

Mr. Choukri CHARRAD Tel. 966 2 283 1064  
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Mr. Mahfouz Omar bin MAHFOUZ

III. SPECIAL GUESTS / الضيوف المدعوين

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GENERAL DIRECTOR
CIVIL DEFENCE DEPARTMENT (CDC) (Saudi Arabia)
Lieutenant Saad Rafea AL-AMRY
Lieutenant Abdullah M. AL-AMRY

DALLA FOR HOTEL MANAGEMENT (Saudi Arabia)
Mr. Khaled ABDEL-GHAFFAR

DISABLED CHILDREN ASSOCIATION (Saudi Arabia)
Mr. Zohair MAYMANI

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<td>Dr. Ali Easa AL-SHOAABEY</td>
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References and information sources:


PERSGA: an extensive library of publications on specific issues relating to the Red Sea information available in both Arab and English from the Regional Organization for the Conservation of the Environment of the Red Sea and Gulf of Aden. See www.persga.org
