

Touristic Fluxes and Carrying Capacity

Lebanon scale





Analysis of Threats and Enabling Factors for Sustainable Tourism at Pilot Scale

Touristic fluxes and carrying capacity Lebanon scale



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OVERVIEW

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REVIEW

Contributors

Talal DARWISH, Pr.

📍 Center of Remote Sensing, CNRS, Lebanon

Amin SHABAN, Pr.

📍 Center of Remote Sensing, CNRS, Lebanon

Sana ABI DIB, PhD

📍 Lebanese University, Faculty of Literature and Human Sciences, Lebanon

Rima CHEBL, Architect

📍 Julfar Engineering, Lebanon

Reviewer

Mahmoud MOUSSA, PhD

📍 National Engineering School of Tunis, Tunisia

Supervisors

Béchir BEJAOU, PhD

📍 National Institute of Marine Sciences and Technologies, Tunisia

Nahed MSAYLEB, PhD

📍 Lebanese University, Faculty of Agriculture and Veterinary Sciences, Lebanon

LAYOUT

Khouloud ATHIMEN, Engineer, Technical Coordinator

📍 National Institute of Marine Sciences and Technologies, Tunisia

Houaida BOUALI, Engineer

📍 National Institute of Marine Sciences and Technologies, Tunisia

Mohamed Ali BRIKI, Engineer

📍 Coastal Protection and Planning Agency, Tunisia

Mouna MRAD, PhD

📍 Water Technology and Research Center, Tunisia

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I. Introduction

Lebanon's strategic location on the eastern shores of the Mediterranean Sea, as well as its diverse natural scenery, cultural heritage and unique landscapes, are the most important assets that have ranked Lebanon top of the list within the Middle East region. In fact, the so-called "Middle East's Switzerland" is the only country, within the Arab context, that consists of four distinct seasons. It is the country where snow covers its western mountain chain for several months. Therefore, it is the ideal destination that encourages tourists to be part of its all year-long activities and to occupy its hotels and resorts through two amazing seasons: winter for skiing on well-equipped arenas and summer for swimming and enjoying the sandy beaches.

Tourism in Lebanon allows tourists to visit the national patrimonial and archaeological sites and museums, and to enjoy the Lebanese highest caliber restaurants as well, and to taste its authentic worldwide famous cuisine. Finally, it invites tourists to profit from business and financial services through luxurious shopping malls and exhibitions. Currently, Lebanon has several large exhibition centers with most of them located within hotels. Offering large exhibition centers in hotels, at waterfront (Beirut) and Tripoli (Rachid Karami) along with free zones presents a significant opportunity to develop Business and Convention Centers to cater for the increasing demand for world-class convention centers.

Lebanon is well renowned for its world-class health services as well and it has always been a leading destination for medical tourism in the Middle East. In 2018, with 150 hospitals, 13,500 highly trained physicians, 31 physicians and 27.3 beds per 10,000 populations, Lebanon was ranked the third healthiest Arab country according to the Bloomberg Global Health Index. In 2018, Bloomberg ranked Lebanon 23rd worldwide for its healthcare efficiency (IDAL, 2019; Ibrahim and Daneshvar, 2018).

In fact, medical and rehabilitation centers, sport and health centers as well as elderly care centers represent the most important assets distinguishing Lebanon's health system as being the best in the region. Indeed, being ranked on the top of the list, Lebanon proves clearly its competitiveness and its potential to become a tradable foreign currency generator for the Lebanese economy.

Therefore, tourism is considered one of Lebanon's leading economic sectors, representing the strongest pillar and the most important source of income and employment. The direct contribution of travel and tourism was estimated US\$ 3.8 billion in 2018, accounting for 7% of Lebanon's GDP (WTTC, 2018). The contribution of domestic tourism to direct travel and tourism GDP in 2017 compared to the spending of foreign tourists was 13.6% and 86.4%, respectively (Figure 1).

However, the performance of the tourism industry is highly dependent on national security and political stability in the country and in the region on wider scale. Unfortunately, it has been negatively affected by Covid-19 global pandemic.

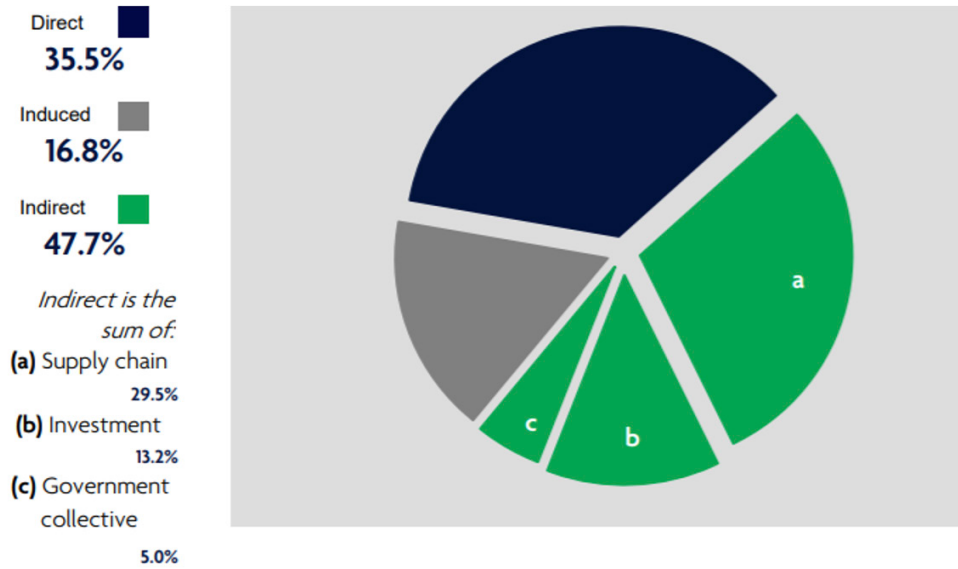


Figure 1. Contribution of tourism to national GDP, 2017 (WTTC, 2018)

II. The specificities of Lebanese tourism

On the national scale, having this significant contribution to the stimulation of economic growth, the tourism sector was considered by the Lebanese Government as being one of the prioritized sectors that should be seriously supported.

This act complements the “Lebanon Economic Vision Report” (McKinsey Report), since the latter envisages a strong, resilient, and diversified tourism sector that caters for all types of markets.

Linear parts of the Lebanese coastline are divided between pebbly or sandy beaches and rocky micro-cliffs. The Lebanese coastal area that stretches over 225 km, provides several opportunities for tourism. Those touristic activities take place either at the seaside tourist resorts or at any other touristic establishment, depending on the type of tourism, as explored in the “Rural tourism value chain assessment report, Lebanon Industry Value Chain Development Project” published by USAID in February 2014 (https://pdf.usaid.gov/pdf_docs/PA00K5X1.pdf).

II.1. Coastal Zone- Great Beirut (Antelias to Jiyeh)

Beirut-centered tourism mainly relies on hotel establishments in the capital such as Phoenicia, Four Seasons, Kempinski Summerland Hotel and Resort, Mövenpick, Riviera, Hilton Beirut, Lancaster, Comodore, Saifi Suites and Sodeco Suites and so on. On the other hand, Beirut’s multilingual and open-minded inhabitants attract both tourists and investors into corporate and business tourism.

All the above factors are strongly supported by trade shows and conferences in Beirut’s major Business and Convention Centers (BCC): Seaside Arena (Beirut Waterfront) and Forum of Beirut. The BCC is an untapped investment opportunity in Tourism. In fact, business Tourism currently contributes 0.4% in the total GDP thanks to direct travel and tourism. However, this contribution is expected to grow at a compound annual growth rate (CAGR) of 2.2% during 2018-2028, as Lebanon embarks on its infrastructure rehabilitation program to attract more foreign investors and businesses (WTTC, 2018). As a result, the new hotels are taking these facts into consideration with their design layouts and amenities provision and offer over 100 rooms as well as all the facilities to host such trade and business events.

On the other hand, the hospitality and the diversity of touristic activities in Beirut improved in 2018, together with the increasing numbers of tourists, all contributed to boosting the sector. In 2018, the average occupancy rate in Beirut hotels reached 64%, compared to 58% in 2011, immediately after the outbreak of the Syrian war. The average stay length scored in 2017 was 3.2 days. The average room booking rate in Beirut hotels reached in USD 169 in 2018 (BlomInvest Bank, 2018) with only Dubai and Muscat registering a higher rate in the region. This is because most of the existing hotels in the capital are rated 4 and 5-star hotels. The city is also famous for being highly active and

vivid and it is as well known for its world-class gastronomy and entertainment. Beirut is also famous for its festivals that have welcomed prestigious international stars.

Finally, it is obvious that the majority of Lebanon's medical and healthcare infrastructure is heavily centralized in Beirut, the capital. In fact, it consists of 16 health facilities, such as the American University of Beirut Medical Center (AUBMC), Hotel Dieu, Clemenceau Medical Center (CMC), Saint George Hospital University Medical Center and University Medical Center- Rizk Hospital. In September 2014, CMC, affiliated with Johns Hopkins International as one of the world's best hospitals for medical tourism. It has become the first hospital in Lebanon to achieve international medical tourism certification from the US-based Medical Travel Quality Alliance (MTQUA).

In 2017, Beirut accounted for most of tourists' expenditure, with Mount Lebanon Governorate ranked next. In fact, in 2018, Beirut hosted 760,000 tourists approximately 67% of their total expenditures were accounted for luxurious fashion and clothing, followed by watches and jewelry with 18% (BlomInvest Bank, 2018). These numbers show clearly the positive impact of travel and tourism on the retail and manufacturing sectors in Lebanon, and especially in Beirut.

Another major tourist destination along the coast is Damour which is located 15 km South of Beirut. This city represents a significant touristic potential through its virgin, natural beaches. It is located in between the green banana plantation and the blue sea, offering it the fact of being highly ranked at the national level for its luxurious sunbathing activities.

Damour beaches are known for their attractions of many privileged tourists, who are willing to pay relatively higher prices to access the area.

Lebanon's tourism sector relies mainly on water sports fans. In fact, several restaurants, cafes, hotels and resorts are located along the beach. There are also two restaurant cafes built along the edges of the Damour River. It also accommodates one 5-star hotel resort with access to the beach equipped with 2 restaurants, 5 pools and many bungalows. Furthermore, it hosts a 3-star hotel with a capacity of 48 rooms, as well as 4-star hotels and several serviced apartments with a capacity of 41 rooms (<https://www.bestlebanonhotels.com/en/damour-hotels-64581>).

In addition to the previously mentioned tourism structures, Damour accommodates several beach resorts and restaurants, unfortunately, with no accurate data.

Another seaside town with major touristic potential through its natural richness is Jiyeh, which is located 20 km South of Beirut. Its main tourist attraction is its sandy beach. Most of this beachfront is occupied by privately owned beach resorts different in terms of classification and theme in catering all tourists, exceptionally with women's private beaches. It accommodates one 5-star hotel and resort that provide guests with business accommodations, and it has a capacity of 152 rooms, a 4-star hotel and a resort, both with easy beach access.

The sandy beach of Jiyeh is divided into two zones: A and B. The following information is based on an interview with the owner of a restaurant (St John restaurant) bordering and managing a part of the beach.

Zone A:

- The sandy beach of zone A is around 1.5 km long and 50 m wide,
- It is managed by 7 restaurants/kiosks,
- The season extends from May 1 to the end of September,
- Average entrance fee: 7,000 LP/person/day. It covers the provision of an umbrella, a chair, and a shower facility,
- Visitors' pattern:
 - In July and August: 2,000 person/weekend day and 200 people/weekday
 - In May, June, and September: 1,000 people/weekend day
- 80% of visitors are coming from Beirut and its surroundings, the rest are from the region of Jiyeh and from the region of Saida.
- Most of the visitors are families (60%), the rest are young single people.
- Parking of cars is free of charge except for one restaurant.
- St. John restaurant:
 - *The beach is 70 m long and 50 m wide.
 - *In July and August: 300 person/weekend day and 50 people/weekday

Zone B:

- It is managed by 1 restaurant and 4 resorts. The resorts have swimming pools but no chalets (except one resort).
- Entrance fee: 6,000-8,000 LP/person/day. It covers the provision of an umbrella, a chair and a shower facility.
- Visitors' pattern:
 - * In July and August: 1,000 people/weekend day and 100 people/weekday
 - * In May, June, and September: 500 person/weekend day and 50 people/weekday
- Most of the visitors are families coming from Beirut and its surroundings.

II.2. Coastal Zone- Northern Part (Akkar to Antelias)

In the northern coastal part of Lebanon, several towns are of an important interest due to their contribution to the tourism sector (Figures 2 and 3). Tourism in this area is seasonal. The medieval labyrinthine city of Tripoli is highly rich in terms of historical importance and traditional architecture. In fact, Lebanon's tourism sector has always relied on its crucial cultural aspects which main attractions are the traditional souks, hammams, madrassas, mosques and khans.

Tripoli accommodates a 5-star hotel resort and spa with beach access with a capacity of 30. Moreover, luxury accommodation has added further to the attractions of Lebanon Tourism. In fact, there are several luxurious hotels such as a 5-star boutique hotel with a capacity of 17 individual rooms as well as a 2-star quality inn with a capacity of 112 rooms in a 6-storey building with a highly cozy resort, too (<https://www.bestlebanonhotels.com/en/damour-hotels-64581>).

Tripoli is also renowned with roughly 250 restaurants serving various menus and cuisines yet, mostly famous with the national authentic Lebanese sweets. Finally, Tripoli hosts Rachid Karamah International Exhibition Center, one of the five largest exhibition centers in the world. Currently it is open only for occasional and seasonal tourists.

As to Beirut, the second largest coastal city is Chekka which is famous not only for its natural beach but also for its cozy accommodation of four-star hotel resorts, among which one hotel offers a capacity of 9 rooms. Indeed, it hosts "Tahet El Rih Beach, Anfeh", which is a free entrance public beach with decent and fine public restaurants.

The charming historical town of Batroun is best known for its beach clubs, nightlife, seafood restaurants and the opportunities it provides for outdoor activities. It accommodates one 5-star hotel with a capacity of 9 rooms, two 4-star resort hotels with a capacity of 68 rooms combined and two 3-star hotels with a capacity of 22 rooms. Yet, there is no data for the other city hosts two guest houses as well and three furnished apartments establishments.

Jbeil (Byblos) is famous for its cultural and religious heritage. In fact, it hosts international music and entertainment festivals and contributes to featuring local and world-acclaimed artists. It accommodates four 5-star hotels and wellness resort, six 4-star hotels one with a capacity of 45 rooms, seventeen 3-star hotels 4 among them are resorts and one 2-star hotel with a capacity of 19 rooms (<https://www.executive-magazine.com/special-report/the-livin-is-easy>). Jbeil is also famous for its seafood restaurants.

Jounieh is also known for its religious tourism. In fact, Our Lady of Harissa is one of the main religious landmarks in Lebanon. Overlooking the entire bay of Jounieh, it draws in millions of people, both Christians and Muslims, from all over the world. The city accommodates ten 5-star hotels, two of which represent hotel resorts, 38 4-star hotel

resorts, eleven 3-star hotels, two 3-star aparthotels, one guest house, and one 2-star hotel with a capacity of 9 rooms (<https://www.executive-magazine.com/special-report/the-livin-is-easy>). On the Jounieh bay, the worldwide famous Casino du Liban, is located as well on an area of about 35,000 square meters. The casino has around 400 slot machines and 60 gaming tables. It has a showroom, night club, theater, banquet facility and five restaurants. The ATCL, in proximity to the military complex, acts as a catalyst for the water sports activities and it hosts several competitions as well.

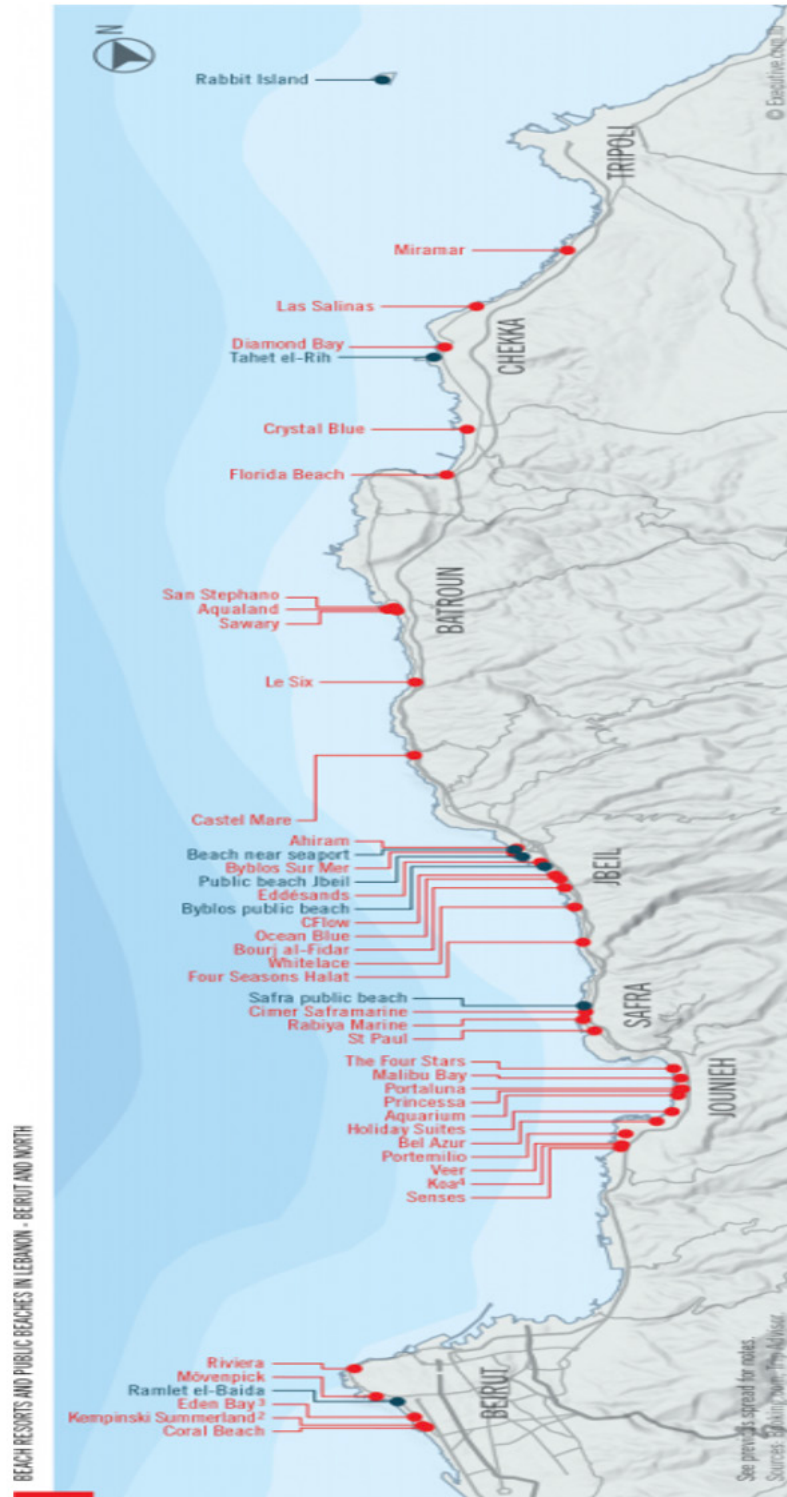


Figure 2. Main touristic sites in North Lebanon.



II.3. Coastal Zone - Southern Part (Jiyeh to Naqoura)

The southern Lebanese coast presents both agricultural and natural zones. In fact, the largest agricultural areas in the southern part are the plain from Saida to Naqoura while the most important natural features are located between Sour (Tyre) and Naqoura with the Tyre nature reserve hosting the Mediterranean turtles (Figures 3 and 4). The region is also famous for its cultural and archeological heritage. In fact, Saida and Tyre are known for being the main ancient port cities. Tourism is characterized in this area by its seasonal aspect, and it is usually highly affected by the political stability of the country.

Saida is the best destination to enjoy the breathtaking Sidon's Sea castle, old souks, soap museum and beautiful beaches. Despite all this diversity and abundance, generally, there is no database of the city's cultural heritage. Indeed, the heritage richness of the city suffers from the lack of both safety measures and uncontrolled urbanization. For example, Saida's heritage is neither mapped, researched, nor published. Its archeological sites, as well, are not well known or accessible to the old city which lacks proper signage to guide the tourists through its maze. Finally, Saida's waterfront fails to act as a touristic attraction to the residents and visitors due to the deficiency in the investments.

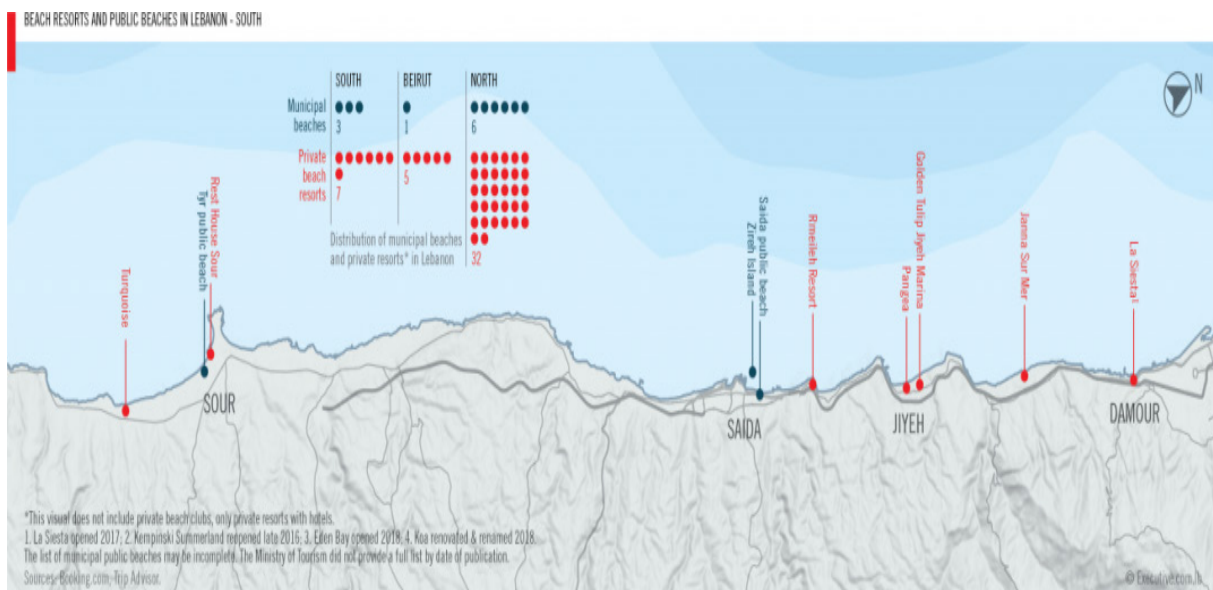


Figure 4. Touristic and patrimonial sites of South Lebanon
(<https://www.executive-magazine.com/special-report/the-livin-is-easy>).

If Saida is envisaged as a tourist city, it is important to mention that hotels and restaurants make up the smallest share (1.3%) of its economic activity (Pierre-Arnaud, 2014).

Except for 2 municipal beaches, there were no proper facilities provided such as public toilets, hostels, and hotels. Only 90,000 local and international tourists visit the city annually and mostly for short visits only. There are few statistical Tourism analyses in Saida, yet a questionnaire conducted by the Consultation and Research Institute (CRI) revealed different purposes behind visiting Saida after studying a very small sample of 156 people (Figure 5).

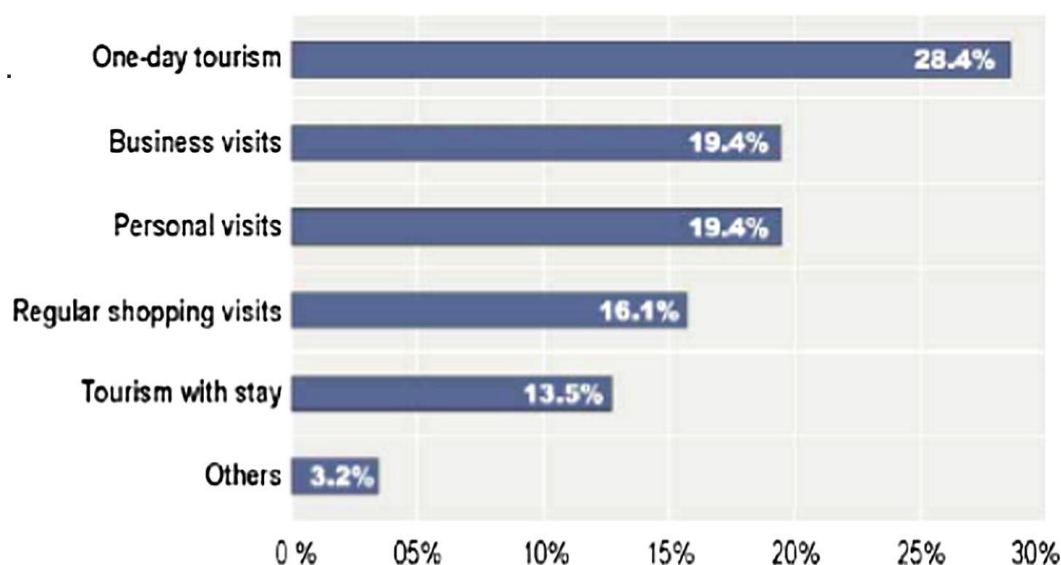


Figure 5. Tourism types and frequency of night stays in Saida, South Lebanon.

Sarafand is another remarkable historical town, located along the Southern coast. It is famous for holding the remaining glass glowing factory in Lebanon that was established in the center of the commercial coastal road. It accommodates 3 hotels, 15 restaurants and 5 cafes (Coastal Area Management Program (CAMP)-Lebanon).

The natural beach of Sarafand, in its current situation, is not attractive for tourism since it is heavily altered by household and constructions. The geographical location of Sarafand, near the famous touristic city Tyre, gives it a positive reflection for the future development of tourism. Yet, the main current physical constraint facing this sector's growth is the lack of touristic accommodation units as well as organized parking places.

Tyre (Sour) is among the 20 oldest cities in the world. It is famous for its historical and natural wonders. It is considered as the best summer destination to enjoy contemplating its crystal-clear sea as well as visiting its interesting monuments and eating in its famous seafood restaurants. It is also famous for its nature reserve, which contains wild flora, and its public beach and tents. It accommodates "Rest House-Tyre " the only 4-star hotel with a capacity of 64 rooms, and two 3-star hotels with a capacity of 39 rooms, with both swimming pool and beach accesses. It accommodates 1 guest house with a capacity of 10 rooms, 1 holiday home and 2 furnished apartment establishments with

no accurate data about their capacity or the existing number of beds (<https://www.executive-magazine.com/special-report/the-livin-is-easy>). Mainly, the existing hotels are not for budget-travelers, with their pricing raging between 50-60 USD/night and 120 USD/night.

The sandy beach south of the city of Tyre is a part of the nature reserve established in November 1998. The following information is based on an interview with a committee member related to the reserve. The sandy beach is divided into two zones: Zone A which is managed by the municipality of the city of Sour, and zone B which has free access without any management.

Zone A:

- The beach is 900 m long and 120 m wide.
- The summer swimming season extends from June 1st to the end of September.
- The municipality rents spaces for kiosks on the beach (80 kiosks for summer 2001).
- Entrance fee: in the form of renting a table and a beach umbrella from the kiosk (3\$/table).
- Visitors' pattern.
- In July and August: 5,000-7,000 person/weekend day and 1,000- 1,400 person/week day.

The survey revealed that 70% of the visitors are coming from the city of Tyre and its region, 20% are coming from Saida and the rest from other different regions.

- Average expenditure/person/day (including food and services): \$10 USD.
- Parking lot is free of charge or at feasible prices,
- Most of the visitors are families.

Zone B:

- The beach is 500 m long and 150 m wide.
- No entrance fee and no facilities.
- Visitors' pattern: In July and August: 4,000 people/weekend day.
- Most of the visitors are families. Nearly all of them are coming from the city of Tyre and its surroundings. The sandy beach of the city of Tyre does not seem to be a destination for Beirut residents seeking bathing on sandy beaches.

Finally, Naqoura is famous for its unspoiled beaches and white cliffs. It accommodates the headquarters of the United Nations Interim Force in Lebanon. Besides, it provides several tourism opportunities. In fact, its striking rocky shore with clear waters provides a place for bathing and diving. Moreover, the 6 km coastal road through the coastal plain seems to be suitable for a biking trail and to enjoy the unique scenery. It accommodates 2 legal restaurants and 10 others that are illegally constructed (Coastal Area Management Program (CAMP)-Lebanon). It accommodates one 4-star hotel resort with a capacity of 30 rooms and a 3-star hotel with a capacity of 11 rooms. Yet, being an area bordering a military zone, any potential touristic activity is to be hindered.

III. Carrying capacity and capacity management in Lebanon

Since 2014, Lebanon Tourism has been witnessing a double-digit average annual growth rate of 10%, with tourist arrivals reaching 1.9 million by the end of 2018 (BlomInvest Bank, 2018). As for the tourist profiles in 2018, and for the 7th consecutive year, the largest share of tourists was greatly accounted for European tourists, reaching 36% of total tourists.

Whereas Arab tourists, who were traditionally known for being the largest visitors, dropped significantly between 2010 and 2018. As for the tourist expenditures, Gulf tourists have been historically known for being the largest ones in terms of spending and consumption. In 2017, Saudi Arabian nationals recorded the largest share of spending, accounting for 14% of total spending followed by UAE (12%) and Kuwait (7%) (IDAL, 2019). Most tourists come to Lebanon for leisure spending (92.1%), compared to 7.9% coming for business spending. Among these, a total of 35.5% represent a direct contribution while 47.7% represents an indirect contribution. Thereby, promoting both the supply chain and investment.

A quick comparison between the types of tourism available in the coastal cities and the one in the rural areas shows biased development of touristic centers for the capital Beirut (Table 1).

Table 1. Availability of tourism activities in the capital and peripheries.

Tourism Type In Lebanon	Available In Beirut/Coast	Available Outside Beirut/Coast
Leisure		
Beach	5	3
Nightlife	5	5
Shopping	4	4
Winter Sports	1	5
Cultural Tourism	4	5
Religious Tourism	5	5
Adventure	4	5
Eco-Tourism	1	5
Car Racing	4	4
Business	5	4
Meetings, Incentive Travel, Conventions And Exhibitions	5	4
Team Building / Retreats	5	5
Wellness / Medical Tourism	5	4
Educational Tourism	5	3

* 1. Not available, 2. Very Rare, 3. Rare, 4. Present, 5. Abundant

Even though Lebanon rural areas can offer nearly all the same types of tourism as Beirut and the coast, touristic activities and leisure are much more limited to only canoeing in the Orontos River. It is obvious as well that the shopping centers and tourist beaches are not available in the rural areas. Despite the attraction of winter tourism and its ski sport on the high snowy mountains, close to the coastal zone, 46% of the hotels are in Beirut and 29% among them are along the coast with the dominance of private housing and chalets in snowy resort areas.

In 2017, the travel and tourism sector generated 131,500 jobs, equivalent to 6.4% of total employment (Figure 6). This included hotel jobs, travel agencies, airlines, as well as passenger's transportation services (WTTC, 2018). Including the wider effect of tourism investments, the supply chain as well as the induced income impacts, it is obvious that the total Tourism industry contribution to national employment has reached 365,500 jobs in 2017, equivalent to 17.9% of the total employment rate.

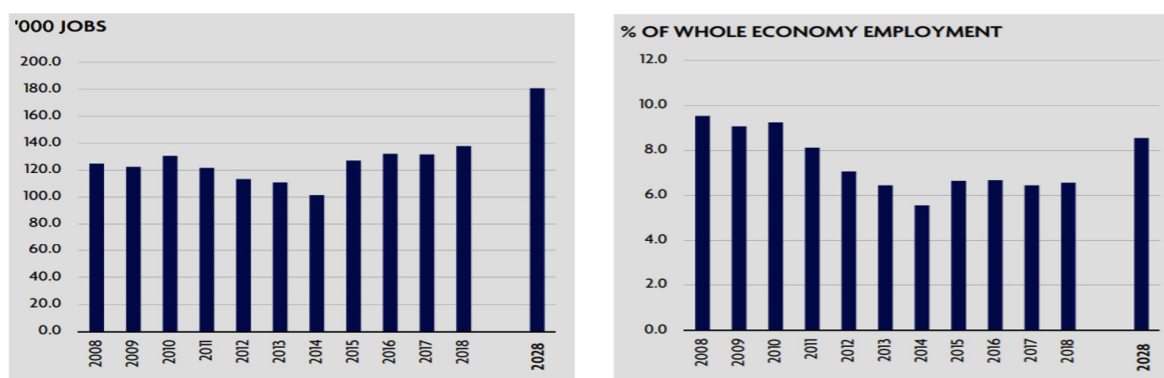


Figure 6. Direct contribution of travel and tourism to national employment and economy.

With more than 50% foreign visitor's share of national export, the foreign tourist export correlated well with the increased foreign visitor's arrival at the Beirut International airport in the last ten years', reaching 2,950,000 visitors with a total turnover of LBP 15 bn. In fact, the largest part of tourist expenditures was spent in Beirut in 2018, with the rest spent in the Mount Lebanon Governorate. As a result, this indicates that marine tourism is still not well developed in the country. A total of 85% of tourists' budgets in 2018 was spent on luxury fashions, clothing, watches, and jewelry.

The average occupancy rate in Beirut hotels reached 64%, compared to 58% in 2011 following the outbreak of the war in Syria. Meanwhile, average occupancy across the country stood at 43%, due to lower occupancy in hotels outside Beirut (around 20-30%). Besides, Due to the prevalence of 4- and 5-stars' hotels in Beirut, the average room rate is relatively high for the country and the region (169\$), with only Dubai and Muscat exceeding this price (IDAL, 2019).

Even though, the number of tourist visitors to main Lebanese patrimonial sites indicates lower interest in coastal historical monuments and sites like Byblos, the Phoenician retaining wall in Batroun has highly alleviated the tidal effect on the following cities: the citadels of Sayda and Tyre, the coastal protected sites like the Tyre reserve, Palm and Rabbit Island. Most visitors go to Baalback and Sayda (Figure 7). Thereby, raising the need to develop the coastal tourist business outside Beirut based on larger marine complexes to attract both local and foreign tourists thanks to important packages and feasible prices.

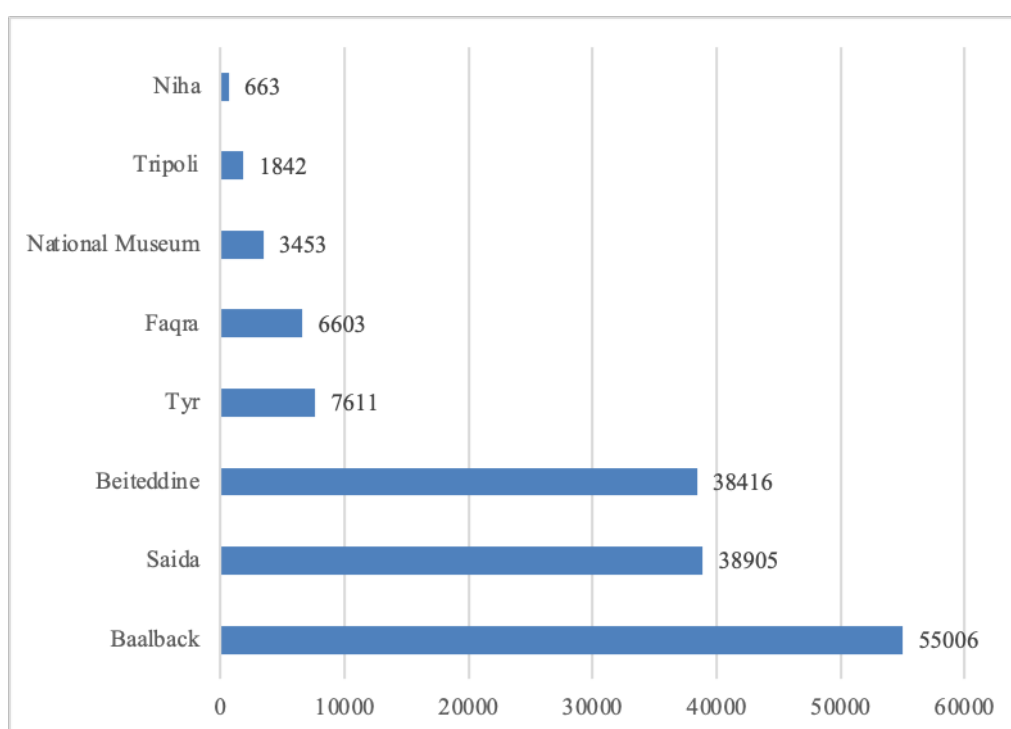
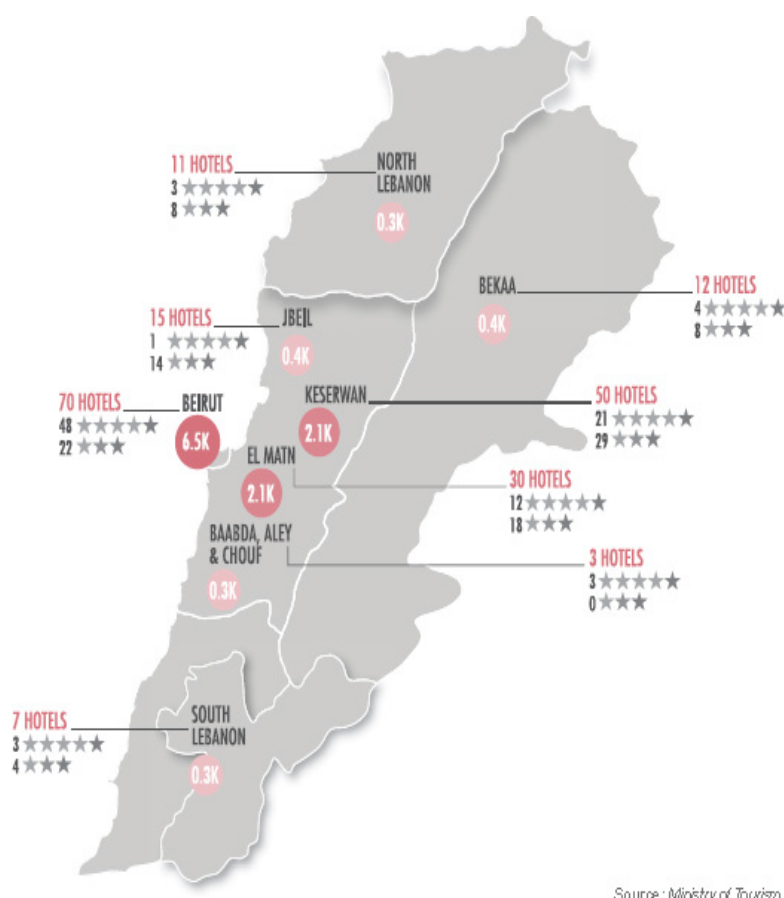


Figure 7. Number of tourist visitors per patrimonial sites.

The extremely high prices on high standard daily marine beach tourism push the Lebanese to travel to Greece and Turkey for more affordable holidays in 4–5-star complexes with a feasible 5-day package including travel and accommodation, food and access to both the sea and the swimming pool as well as to all other hotel facilities. Furthermore, Lebanon local banks offered loans for luxury tourism abroad instead of promoting local business tourism.

Lebanon has 198 hotels, among which 95 are four- and five-star hotels and 103 are 3-star hotels (Table 2), with a total capacity of around 12,300 rooms. 4- and 5-star hotels are concentrated in the capital, with several hotel facilities in mount Lebanon and inland (Figure 8). Even such attractive coastal cities like Tyre and Batroun, though they are depicting few hotel facilities, are offering, at the same time, plenty of opportunities to develop high-quality internationally branded boutique hotels outside Beirut.



Source: Ministry of Tourism.

Figure 8. Distribution and category of hotels in Lebanon.

Among 14 large investments in touristic hotels and complexes that are mediated by IDAL between 2003 and 2018 and with an investment of USD 1 bn as well as a creation of 2900 direct jobs, there were only two projects related to marine tourism. These are, namely, the project achieved in Beirut (Summerland Kempinski hotel and resort) and another one in coastal Jyeh, 15 km South of Beirut (Jyeh Resort, Blue Island).

Finally, in order to put Lebanon back on the region touristic map, the government is gradually overcoming all the obstacles that are hampering the growth of this sector and improving the existing establishments. Despite all the available advantages and opportunities, a substantial effort will have to be made to market Lebanon as one of the most attractive tourist destinations. Yet, this scenario seems to be beyond the government's current economic and pandemic situation.

Normally, the lands located along the seashore are highly solicited for their touristic value and their future potential investment. However, it is obvious that Lebanon tourism potential is far from being fully exploited, especially in the coastal region where it lacks an effective strategy and vision in taking advantage of the existing touristic potentials.

Table 2. Tourist flux in relation to available facilities in Lebanon.

Parameters		Touristic Fluxes and Carrying Capacity in the Coastal Cities in Lebanon		
		2018	2019	2020
Number of Establishments		198	208	208
Number of Beds		NA	NA	NA
Number of Tourism Establishments According to their Category	2 Stars	NA	NA	NA
	3 Stars	103		
	4 Stars	95	NA	NA
	5 Stars		NA	NA
Number of Overnight / Year		521,500		
Number of Tourists / Year		1,360,000	1,900,000	NA
Visitor Expenditure		800 Euro	NA	NA
Average Length of Stay		3 days	NA	NA
Tourism Characterized by Seasonality		Yes	Yes	NA
Growth of Tourist Arrivals		10%	NA	NA

IV. Conclusions

While the Middle East is ranked second on the list worldwide in terms of travel destination and investment, Lebanon similarly possesses all vital assets to be the best targeted destination. It is well known for its amazing natural scenery, historical patrimonial fortune, as well as its cultural and religious aspects, and mainly its famous medical tourism. The researched number of tourists (1,360,000 people), in 2017, has slightly increased to reach 1,900,000 in 2018 and it was expected to exceed 2,000,000 in 2020. The seasonal aspect depicted in winter sports and summer leisure's can be bridged by offering better conditions for indoor sports both in winter and summer.

Paying more attention to improve and decentralize tourism accommodation capacity. First, by creating touristic hotel complexes on the coastal area outside Beirut, as well as offering feasible families' packages which can attract more tourists to visit the area and enjoy the mountain and maritime sports. This should be achieved thanks to further accessibility to the national and international highly advanced tourism industry. The average hotel rate in Lebanon is still relatively high (169\$) due to the prevalence of 4- and 5-star hotels.

Offering, special accommodation packages in 4–5-star hotels and developing the 3-star tourism management, as well as achieving better sanitary services and higher quality management, all may contribute to lowering the cost of accommodation and lengthening further the average tourists stay in Lebanon, which is currently restricted to only 3.2 nights. Moreover, these measures can increase the one visitor expenditure that is currently estimated at 800 Euros, through enlarging the indirect expenses on local travel, restaurants, and shops. Finally, it is crucial as well to involve the advanced Lebanese religious, medical and fashion business that can contribute further to developing Lebanon Tourism. However, an integrated national environmental and touristic policy should be set and issued to ensure more decentralization and more feasibility of tourism budget, cleaner coastal waters, and safer food for the increasing tourists flow to Lebanon.

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