

## TOURISM COMPETITIVENESS IN ARMENIA AND WORLDWIDE

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*After the collapse due to Covid-19 pandemic, tourism sphere started recovering in 2021 and 2022. International tourism climbed to nearly 60% of pre-pandemic levels in January-July 2022. In Armenia tourism is recovering and in 2022 January-October the number of incoming tourism arrivals was 1400000. This growth is also connected with the high number of Russian tourists visiting Armenia during Russian-Ukrainian war.*

*This paper presents travel and tourism competitiveness and development indexes of 2019 and 2021. Armenia was the 61st with 4.0 score in 2021 in TTDI. The main issues are connected with the qualification of the labor force, country brand strategy, T&T capital investment, ticket taxes and airport charges, air and ground transport infrastructure, natural, cultural and non-leisure resources, environmental sustainability, pollution and environmental conditions, preservation of nature, seasonality of international tourist arrivals, etc. So, some steps are needed in above-mentioned directions to insure sustainable tourism development in Armenia.*

In recent years, tourism was one of the fast-growing spheres of the world economy. However, Covid-19 changed tourism development trends. It brought widespread restrictions on international travel. As a result, international tourism fell by 73% in 2020, by far the largest drop recorded in history. International arrivals were up by 5% in 2021, though down by 71% compared to 2019 levels. World scheduled passenger traffic for the year 2020 - compared to 2019 levels - showed a reduction of 50% of seats



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offered by airlines, a reduction of 2,703 million passengers (-60%) and a USD 372 billion loss of passenger revenues of airlines. The cruise industry also experienced a loss of three in four passengers in 2020, relative to the 27.5 million passengers transported in the previous year.

In 2019, the contribution of tourism to the world economy amounted to USD 3.5 trillion, or 4% of world GDP, measured in tourism direct gross domestic product. According to UNWTO, the collapse in both international and domestic tourism cut tourism direct GDP by more than half in 2020, reducing it by USD 2.0 trillion, to 1.8% of world GDP.

The loss in export revenues from international tourism in 2020 is estimated at USD 1.1 trillion and represents 42% of the total loss in international trade in 2020.

The International Labour Organization estimates that the pandemic could cause the equivalent of 305 million job losses, many of which are in the tourism sector<sup>1</sup>.

The above-mentioned data reveal that tourism sphere suffered a lot. However, in 2022 due to the levels of vaccination, travelling and tourism started to recover. International tourism climbed to nearly 60% of pre-pandemic levels in January-July 2022. International tourist arrivals almost tripled (+172%) in January-July 2022 compared to the same period of 2021. Europe and the Middle East showed the fastest recovery in January-July 2022, with arrivals reaching 74% and 76% of 2019 levels, respectively. Europe (+190%) welcomed almost three times as many international arrivals as in the first seven months of 2021 while the Middle East (+287%) saw arrivals grow almost four times year-on-year in January-July 2022. The

Americas (+103%) and Africa (+171%) also recorded strong growth in January-July 2022 compared to 2021, reaching 65% and 60% of 2019 levels respectively. Asia and the Pacific (+165%) saw arrivals more than double in the first seven months of 2022, though they remained 86% below 2019 levels.

According to the September 2022 survey, the UNWTO Panel of Tourism Experts rated the period May-August 2022 with a score of 125 (on a scale of 0 to 200). Prospects for the remainder of the year are cautiously optimistic, with a score of 111, showing a downgrade in confidence levels. The challenging economic environment including high inflation and the spike in oil prices, aggravated by the war in Ukraine, continues to be the main factor weighing on the recovery of tourism, according to experts. Some 61% of experts now see a potential return of international arrivals to 2019 levels in 2024 or later while those indicating a return to pre-pandemic levels in 2023 has diminished (27%) compared to the May survey (48%)<sup>2</sup>.

Tourism is one of the main spheres of the economy in the Republic of Armenia and it has shown growth tendencies in recent years<sup>3</sup>. According to the Statistical Committee of the RA, in 2019 1894377 tourists arrived in Armenia (increasing by 14.7% as compared to 2018)<sup>4</sup>. In Armenia the growth of the sphere was disrupted because of the Covid-19 pandemic as in the whole world. In 2020, the number of incoming tourist visits to Armenia decreased by 81% composing 360338. Due to vaccination and tourism restarting rates in 2021 870308 incoming tourists visited Armenia<sup>5</sup>. In 2022 January-October, the number of incoming tourism arrivals was 1400000<sup>6</sup>. This growth is also connected with

<sup>1</sup> The economic impact of restricting international mobility, 2022, Organisation for Economic Co-operation and Development (OECD) and World Tourism Organization (UNWTO), pp. 3-4, <https://www.e-unwto.org/doi/epdf/10.18111/9789284423743>

<sup>2</sup> UNWTO World Tourism Barometer and Statistical Annex, September 2022, <https://www.e-unwto.org/doi/epdf/10.18111/wtobarometereng.2022.20.1.5?role=tab>

<sup>3</sup> Tovmasyan G. (2021). Capital Investments, Tourist Tax and Tourism Development: The Case Study of Armenia. *Economics and Sociology*, 14(1), 199-213. DOI: 10.14254/2071-789X.2021/14-1/13

<sup>4</sup> The Socio-economic Situation in the RA, 2019 January-December, The Statistical Committee of the RA, p. 139, [https://www.armstat.am/file/article/sv\\_12\\_19a\\_421.pdf](https://www.armstat.am/file/article/sv_12_19a_421.pdf)

<sup>5</sup> The Socio-economic Situation in the RA, 2022 January, The Statistical Committee of the RA, p. 112, [https://armstat.am/file/article/sv\\_01\\_22a\\_421.pdf](https://armstat.am/file/article/sv_01_22a_421.pdf)

<sup>6</sup> Data were taken from FB page of Tourism Committee of the RA, <https://www.facebook.com/ArmeniaTourismCommittee/posts/pfbid0ThKmDsHp6BqGd9SoZYf6SkZmoq2ejPpRehoxyCEeuNETSkisdXQjYSWjFxmMGtUEI>

the high number of Russian tourists visiting Armenia during Russian-Ukrainian war<sup>7</sup>.

In recent years domestic tourism was also developing. In 2019 the number of domestic tourists in Armenia was 1544600, increasing by 41.4% compared to the previous year<sup>8</sup>. In 2020 the number of domestic tourists decreased by about 33% compared to the previous year, amounting to 1045756 people. However, in 2021 the number of domestic tourists increased by 52.6% compared to 2020, and by 3.3% compared to 2019<sup>9</sup>.

After the pandemic it is very important to be competitive in international tourism market for attracting new tourists. That is why this paper will discuss tourism competitiveness issues in Armenia and other countries.

Tourism competitiveness for a destination is about the ability of the place to optimise its attractiveness for residents and non-residents, to deliver quality, innovative, and attractive (e.g. providing good value for money) tourism services to consumers and to gain market shares on the domestic and global marketplaces, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way<sup>10</sup>.

World Economic Forum measures Travel & Tourism Competitiveness Index since 2007.

A direct evolution of the Travel & Tourism Competitiveness Index (TTCI), the new Travel & Tourism Development Index (TTDI) benchmarks and measures “the set of factors and policies that enable the sustainable and resilient development of the Travel and Tourism (T&T) sector, which in turn contributes to the development of a country”. The 2021 edition of the index highlights the vital need to invest in T&T, the impact of COVID-19 and how sector stakeholders can draw on T&T development strategies to build

back better. In particular, amid the current challenges, shifting demand dynamics and future opportunities and risks, a more inclusive, sustainable and resilient sector must be created<sup>11</sup>.

The transformation of the TTCI into the TTDI reflects the index’s increased coverage of T&T development concepts, including sustainability and resilience impact, on T&T growth and is designed to highlight the sector’s role in broader economic and social development as well as the need for T&T stakeholder collaboration to mitigate the impact of the pandemic, bolster the recovery and deal with future challenges and risks. Some of the most notable framework and methodology differences between the TTCI and TTDI include the additions of new pillars, including Non-Leisure Resources, Socioeconomic Resilience and Conditions, and T&T Demand Pressure and Impact. The index is comprised of five subindexes, 17 pillars and 112 individual indicators, distributed among the different pillars (figure 1).

Aside from the United States (2nd), the top 10 scoring countries are high-income economies in the Europe and Eurasia or Asia-Pacific regions. Japan tops the ranking, with fellow regional economies of Australia and Singapore coming in 7th and 9th, respectively. Meanwhile, Italy joined the top 10 (up from 12th in 2019) in 2021, while Canada slid out (10th to 13th). The remaining top 10 TTDI performers are Spain (3rd), France (4th), Germany (5th), Switzerland (6th) and the United Kingdom (8th). Viet Nam experienced the greatest improvement in score (+4.7%, 60th to 52nd) on the overall index, while Indonesia (+3.4%, 44th to 32nd) and Saudi Arabia (+2.3%, 43rd to 33rd) had the greatest improvement in rank. Meanwhile, Malaysia (-3.0%, 29th to 38th), India (-2.6%, 46th to 54th) and Mongolia (-2.1%, 76th to

<sup>7</sup> Tovmasyan G., What impact will the Great Flow of Russian Tourists have on the Restoration of Armenian Tourism?, AMBERD Bulletin, 2022/2, pp. 55-64, DOI: 10.52174/2579-2989\_2022.2-55

<sup>8</sup> The Socioeconomic Situation of the RA in 2021 January, p. 115, [https://www.armstat.am/file/article/sv\\_01\\_21a\\_422.pdf](https://www.armstat.am/file/article/sv_01_21a_422.pdf)

<sup>9</sup> The Socioeconomic Situation of the RA in 2022 January, p. 114, [https://www.armstat.am/file/article/sv\\_01\\_22a\\_422.pdf](https://www.armstat.am/file/article/sv_01_22a_422.pdf)

<sup>10</sup> Dupeyras A., MacCallum N., “Indicators for Measuring Competitiveness in Tourism: A Guidance Document”, 2013, OECD Tourism Papers, 2013/02, OECD Publishing, p. 14, <http://www.oecd.org/cfe/tourism/Indicators%20for%20Measuring%20Competitiveness%20in%20Tourism.pdf>

<sup>11</sup> Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future, <https://www.weforum.org/reports/travel-and-tourism-development-index-2021/>

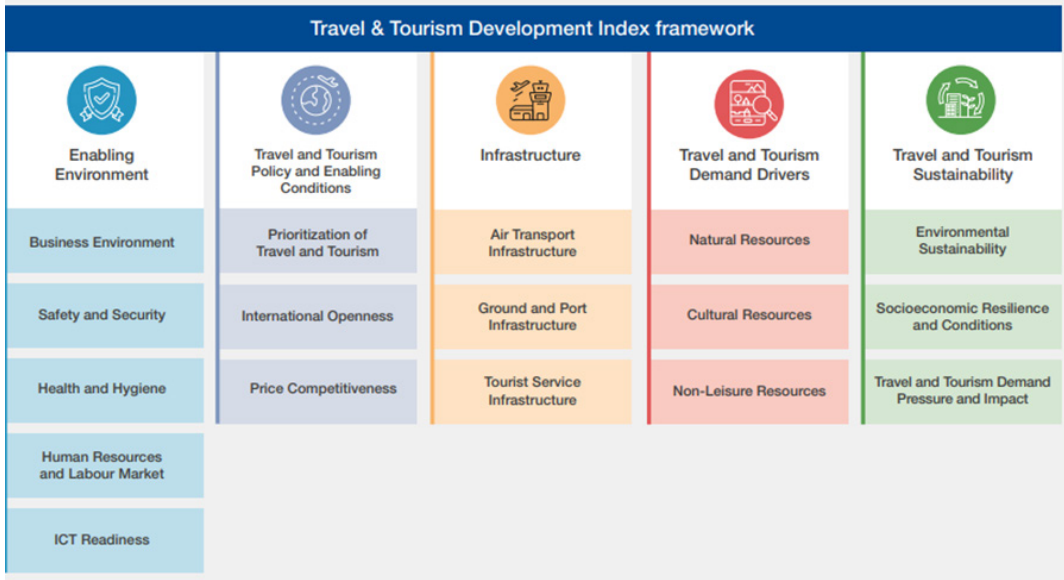


FIGURE 1

**The Travel & Tourism Development Index Framework<sup>12</sup>**

TABLE 1

**Travel & Tourism Development Index 2021 overall rankings for some countries<sup>13</sup>**

Rank	Economy	Score	Change since 2019	
			Rank	Score
1	Japan	5.2	1	0.7%
2	United States	5.2	-1	-1.0%
3	Spain	5.2	2	0.0%
4	France	5.1	2	-0.2%
5	Germany	5.1	-1	-1.8%
6	Switzerland	5.0	1	-2.1%
7	Australia	5.0	1	-1.3%
8	United Kingdom	5.0	-5	-4.5%
9	Singapore	5.0	0	-1.4%
10	Italy	4.9	2	0.8%
<b>Eurasian Economic Union member states</b>				
61	Armenia	4.0	4	1.9%
-	Russian Federation	-	-	-
66	Kazakhstan	3.9	0	0.3%
90	Kyrgyz Republic	3.4	3	1.9%
-	Belarus	-	-	-
<b>Neighbour countries of Armenia</b>				
44	Georgia	4.3	3	1.4%
45	Turkey	4.2	4	1.3%
63	Azerbaijan	4.0	-4	-0.3%
-	Iran	-	-	-

<sup>12</sup> Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future, 2022, p. 8, [https://www3.weforum.org/docs/WEF\\_Travel\\_Tourism\\_Development\\_2021.pdf](https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf)

<sup>13</sup> Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future, 2022, p. 13, [https://www3.weforum.org/docs/WEF\\_Travel\\_Tourism\\_Development\\_2021.pdf](https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf)

84th) had the largest declines in ranking<sup>14</sup>.

The TTDI 2021 covers 117 countries. Economies that were covered in the TTCI 2019 but are not covered in the TTDI 2021 are Algeria, Brunei Darussalam, Burkina Faso, Burundi, Democratic Republic of the Congo, Ethiopia, Eswatini, Gambia, Guinea, Haiti, Iran, Jamaica, Liberia, Mauritania, Mozambique, Norway, Oman, the Russian Federation, Seychelles, Uganda, Ukraine, Zimbabwe and Taiwan, China. The 117 economies covered this year account for approximately 96% of the world's direct T&T GDP in 2020. Data for the TTDI 2021 was collected before the war in Ukraine. So, Russian Federation and Ukraine were

removed from the ranking as data for these economies no longer reflect current or longer-term trends and conditions<sup>15</sup>.

Table 1 shows the rankings for some countries. Armenia was the 61st with 4.0 score. The neighbour states Georgia (44th) and Turkey (45th) are in higher ranking, while Azerbaijan is behind us (63rd).

Table 2 shows the index for Armenia for 2019 and 2021.

In TTCI 2019 Armenia was the 79th with 3.7 score. Compared to the 2019 report, there is a drastic change in several indicators in 2021 report: indicators of safety and security, international openness, price competitiveness, ICT readiness, infrastructure have improved,

TABLE 2

**TTDI and TTCI of Armenia in 2019 and 2021<sup>16</sup>**

	2021		2019	
	Rank	Score	Rank	Score
<b>TTDI of Armenia</b>	<b>61</b>	<b>4.0</b>	<b>79</b>	<b>3.7</b>
<b>Enabling environment subindex</b>	<b>43</b>	<b>5.1</b>	<b>50</b>	<b>5.3</b>
Business environment	43	4.3	31	5.0
Safety and security	19	6.0	40	5.8
Health and Hygiene	37	5.5	44	6.0
Human resources and labour market	61	4.3	52	4.8
ICT Readiness	55	5.1	68	4.7
<b>T&amp;T Policy and Enabling conditions subindex</b>	<b>16</b>	<b>4.8</b>	<b>74</b>	<b>4.4</b>
Prioritization of travel and tourism	67	4.0	74	4.7
International openness	45	4.5	74	3.2
Price competitiveness	19	6.9	30	5.7
<b>Infrastructure subindex</b>	<b>73</b>	<b>3.2</b>	<b>81</b>	<b>3.2</b>
Air transport infrastructure	78	2.7	88	2.4
Ground and port infrastructure	74	3.2	91	2.8
Tourist service infrastructure	57	3.7	62	4.3
<b>T&amp;T Demand Drivers subindex (in 2019 report this was Natural and cultural resources)</b>	<b>108</b>	<b>1.7</b>	<b>103</b>	<b>2.0</b>
Natural resources	105	1.5	95	2.5
Cultural resources	85	2.0	91	1.4
Non-leisure resources (added in 2021)	88	1.5	-	-
<b>T&amp;T Sustainability subindex (added in 2021)</b>	<b>37</b>	<b>4.4</b>	<b>-</b>	<b>-</b>
Environmental sustainability (added in 2021)	70	3.9	-	-
Socioeconomic resilience and conditions (added in 2021)	40	4.7	-	-
T&T demand pressure and impact (added in 2021)	20	4.6	-	-

<sup>14</sup> Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future, 2022, pp. 3-4, [https://www3.weforum.org/docs/WEF\\_Travel\\_Tourism\\_Development\\_2021.pdf](https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf)

<sup>15</sup> Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future, 2022, p. 12, [https://www3.weforum.org/docs/WEF\\_Travel\\_Tourism\\_Development\\_2021.pdf](https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf)

<sup>16</sup> Armenia, Travel & Tourism Competitiveness Index 2019 edition, <http://reports.weforum.org/travel-and-tourism-competitiveness-report-2019/country-profiles/?fbclid=IwAR22gzyD-mq7h5HY7ioPju4Zl1OX06R077o0RJ6I9VNaLUgtWwF5Sa03u0#economy=ARM>,

Armenia, Travel & Tourism Development Index 2021 edition, <https://www.weforum.org/reports/travel-and-tourism-development-index-2021/explore-the-data>

indicators of business environment, human resources and labor market, natural and cultural resources have deteriorated. Key issues were: Qualification of the labor force (65th place), country brand strategy (61st place), T&T capital investment, % of total investment (98th place), ticket taxes and airport charges, 0-100 (best) (88th place), air and ground transport infrastructure (ranked 78th and 74th), indicators of natural, cultural and non-leisure resources (ranked 105th, 85th and 88th), environmental sustainability (ranked 70th), pollution and environmental conditions (91st place), preservation of nature (83rd place), share of young people not in employment or education (103rd place, 31.1% of 15-24 year old), seasonality of international tourist arrivals, peak season % of total (81st place) etc.

Armenia ranks first in terms of 3G mobile network coverage rate, % of pop., timeliness of providing monthly/quarterly T&T data, inbound length of stay (average: 17.7 days)<sup>17</sup>.

Thus, in order to increase tourism competitiveness, comprehensive actions are needed on the pillars of the TTDI, the indicators of which are low in the report. Among the necessary main actions are:

- Improvement of tourist services and transport infrastructure. In this direction, it is very important to increase the quality of tourist services<sup>18</sup>, as well as the improvement of the air and land transport infrastructure, the increase of direct flights, and the reduction of air ticket prices<sup>19</sup>.

- Increasing the level of environmental

sustainability and protection of natural resources. It is necessary to develop the concept of sustainable tourism, which will contribute to the protection of the environment, reducing the negative impact of tourism on nature and natural resources<sup>20</sup>.

- Increasing the qualifications of tourism labor force. The development of the tourism sector is largely influenced by the availability of qualified labor force. In the RA, the relationship between education and labor market in the field of tourism is incomplete<sup>21</sup>, while education should ensure the preparation of qualified personnel in accordance with the requirements of the labor market<sup>22</sup>. In this regard, a number of measures are necessary: the participation of employers in the creation of educational programs and in the organization of education, improvement of practices, updating of subject programs according to the requirements of the labor market, training of workers in the field, etc.

- Increasing the effectiveness of tourism marketing and branding<sup>23</sup>. In order to make the country recognizable and attractive abroad, it is necessary to implement an effective tourism marketing and branding strategy of the country, large-scale marketing activities using digital marketing tools, social networks, etc.

Armenia should implement sustainable tourism development strategies by increasing the contribution of tourism in social-economic, cultural, environmental development of the country.

<sup>17</sup> Armenia, Travel & Tourism Development Index 2021 edition, <https://www.weforum.org/reports/travel-and-tourism-development-index-2021/explore-the-data>

<sup>18</sup> Tovmasyan G., Evaluating the Quality of Hotel Services Based on Tourists' Perceptions and Expectations: The Case Study of Armenia, *Journal of International Studies*, 13(1), 2020, Centre of Sociological Research, 93-107, DOI: 10.14254/2071-8330.2020/13-1/6 (indexed in Scopus)

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<sup>19</sup> Tovmasyan G., The Problems of Tourism Development in the Republic of Armenia, 2020, Meknark LLC, 622p.

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**Գայանե ԹՈՎՄԱՅԱՆ**  
 «Ամբերդ» հեղափոխական կենտրոնի ավագ հեղափոխող, ՀՊՏՀ  
 րնտեսագիտության թեկնածու, դոցենտ

ՀԱՅԱՍՏԱՆ ԵՎ ԱՇԽԱՐՀ

**ԶՐՈՍԱՇՐՋՈՒԹՅԱՆ ՄՐՑՈՒՆԱԿՈՒԹՅՈՒՆԸ ՀԱՅԱՍՏԱՆՈՒՄ ԵՎ ԱՇԽԱՐՀՈՒՄ**

COVID-19 համավարակի պատճառով զբոսաշրջության ոլորտն անկում ապրեց, սակայն սկսեց վերականգնվել 2021 և 2022 թվականներին: Միջազգային զբոսաշրջությունը 2022 թվականի հունվար-հուլիսին աճել է մինչհամավարակային մակարդակի գրեթե 60%-ի չափով: Հայաստանում ևս զբոսաշրջությունը վերականգնվում է, և 2022 թվականի հունվար-հոկտեմբերին ներգնա զբոսաշրջիկների քանակը կազմել է 1400000 մարդ, ինչը պայմանավորված է նաև ռուսուկրախնական պատերազմի ժամանակահատվածում Հայաստան այցելած ռուս զբոսաշրջիկների մեծ թվով:

Այս հոդվածում ներկայացվում են ճանապարհորդության և զբոսաշրջության մրցունակության և զարգացման համաթվերը 2019 և 2021 թվականներին: Հայաստանը 2021 թվականին TTDI-ում 4,0 միավորով զբաղեցրել է 61-րդ տեղը: Հիմնական խնդիրները վերաբերում են աշխատուժի հմտությունների մակարդակին, երկրի բրենդի ռազմավարությանը, զբոսաշրջության կապիտալ ներդրումներին, տոմսերի և օդանավակայանի հարկերին, օդային և ցամաքային տրանսպորտի ենթակառուցվածքին, բնական, մշակութային և ոչ ռեկրեացիոն ռեսուրսներին, շրջակա միջավայրի կայունությանը, շրջակա միջավայրի պաշտպանությանը, միջազգային զբոսաշրջիկների ժամանումների սեզոնայնությանը և այլն: Այսպիսով՝ Հայաստանում զբոսաշրջության կայուն զարգացում ապահովելու համար վերոնշյալ ուղղություններով անհրաժեշտ է կատարել որոշակի քայլեր:

**Հիմնաբառեր.** զբոսաշրջություն, մրցունակություն, TTCI, TTDI, ցուցանիշ, կայունություն

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АРМЕНИЯ И МИР

**КОНКУРЕНТОСПОСОБНОСТЬ ТУРИЗМА В АРМЕНИИ И В МИРЕ**

После коллапса из-за пандемии Covid-19 сфера туризма начала восстанавливаться в 2021 и 2022 годах. Международный туризм поднялся почти до 60% допандемического уровня в январе-июле 2022 года. В Армении также восстанавливается туризм, и в январе-октябре 2022 года количество въездных туристических поездок составило 1400000. Этот рост также связан с большим количеством российских туристов, посетивших Армению во время российско-украинской войны.

В этой статье представлены индексы конкурентоспособности и развития путешествий и туризма за 2019 и 2021 годы. Армения заняла 61-е место с 4,0 баллами в 2021 году в TTDI. Основные проблемы связаны с квалификацией рабочей силы, стратегией бренда страны, капитальными вложениями в сфере туризма, налогами на билеты и аэропортовыми сборами, инфраструктурой воздушного и наземного транспорта, природными, культурными и неразвлекательными ресурсами, экологической устойчивостью, загрязнением и состоянием окружающей среды, охрана природы, сезонность международных туристических прибытий и т.д. Таким образом, необходимы некоторые шаги в вышеуказанных направлениях для обеспечения устойчивого развития туризма в Армении.

**Ключевые слова:** туризм, конкурентоспособность, TTCI, TTDI, показатель, устойчивость