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ARMENIA AS A TOURISM DESTINATION FOR POLISH TOURISTS

Armenia is an attractive tourism destination with high potential for development due to its rich history and culture, beautiful nature and countryside, as well as good tourism infrastructure and other important resources. The main types of tourism include: historical and cultural tourism, religious tourism, wellness and resort tourism, sport tourism, eco- and agro- tourism, gastronomy tourism and adventure tourism. The article presents the current state of the sphere and the main touristic assets. Polish tourists' perceptions of Armenia as a tourism destination are analyzed in order to find out areas of travelers' satisfaction and dissatisfaction. A qualitative analysis is based on 90 tourists' comments regarding their holiday experience with respect to main coach tours' attributes. As a conclusion some suggestions for development are made on the basis of the conducted analysis.

Key words: *tourism, destination, assets, tour, perception, satisfaction.*

JEL: L83, O14, Z10

Introduction

Tourism is considered to be one of the largest industries all over the world. The number of international tourist arrivals increased from 25 million (1950) up to 1,235 million in 2016 (a 3.9% increase over the previous year). For 2050 the forecast is 1,874 million tourists in the world¹.

¹ UNWTO Tourism Highlights, 2016 Edition, p. 3, URL: <http://www.eunwto.org/doi/pdf/10.18111/9789284418145>, accessed: November 2017.

In Armenia tourism is announced as the main sector of economy. In recent years the number of tourists has increased. In 2016 1,259,657 tourists visited Armenia (5.7% growth compared to 2015), and in 2017 January-September 1,172,402 tourists visited Armenia. In 2016 the 21.7% of incoming tourists were from Russian Federation, 17% were from the Islamic Republic of Iran, 9.6% were from USA, 25.8% were from EU countries (6.3% from Germany, 5.3% from France, 3.1% from Italy, 7.4% from other EU countries), 3.3% were from Georgia, 16.1% were from other countries².

To illustrate the role of this sphere in the economy of Armenia, some data are worth indicating. The direct contribution of Travel & Tourism to GDP was USD 0.4 bn, 3.8% of total GDP in 2016, the total contribution of Travel & Tourism to GDP was USD 1.5 bn, 14.0% of GDP in 2016. In 2016 Travel & Tourism directly supported 38,500 jobs (3.3% of total employment), and the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 12.5% of total employment (143,500 jobs). Visitor exports generated USD 918.4 mn, 28.0% of total exports in 2016. Travel & Tourism investment in 2016 was USD 0.1 bn, 4.4% of total investment³.

Armenia possesses a good tourism infrastructure. According to the data presented in table 1, the number of hotel facilities was 551 in the RA in 2016, which included hotels, resorts, rest houses, etc. Their volume of services was counted 22,127.2 mn AMD. Food and beverage service activities accounted 71,426.9 mn AMD in 2016. The number of tourism agencies was 597.

Table 1

Accommodation, food and beverage services and services of tourism agencies in the RA, 2014–2016⁴

Type of service	2014		2015		2016	
	Volume of services, mn AMD	Number, unit	Volume of services, mn AMD	Number, unit	Volume of services, mn AMD	Number, unit
Accommodation services	18,937.0	409	22,127.2	474	22,960.9	551
Food and beverage service activities	64,745.8	1,703	68,688.2	1,743	71,426.9	1,760
Tourism agencies	14,364.5	379	13,471.9	460	12,018.3	597

The prices in Armenia are affordable for tourists. The main prices are: meal in an inexpensive restaurant is 5.21 € a three-course, meal for 2 people in a mid-range restaurant with is 17.36 €, one way ticket for local transport, as well as taxi 1 km is 0.17 €⁵, prices of accommodation vary from 2-30 € per night (the minimum price in hostels) up to 100-200 € in executive suites, and 1,000-2,500 € in presidential rooms⁶. Day tours in Armenia are 15-20 €⁷.

² Socio-Economic Situation of the RA in January 2017, pp. 88-89, NSS of the RA (in Armenian).

³ Travel & Tourism Economic Impact 2017 Armenia, World Travel and Tourism Council, p. 1.

⁴ The data were provided by the National Statistical Service of the RA .

⁵ Cost of Living in Yerevan, <https://www.numbeo.com/cost-of-living/in/Yerevan?displayCurrency=EUR>, accessed: December 2017.

⁶ Armhotels, <http://www.armhotels.am>, accessed: December 2017.

⁷ Services For Guests Visiting Armenia, https://www.hyurservice.com/eng/trips_reg_eng.php?lang=eng, accessed: December 2017.

Because of growing importance of tourism to the country's economy, it is crucial to investigate tourists' opinions about Armenia as a tourism destination. Such information is essential for developing a marketing strategy for Armenia in order to attract more visitors. The main objective of this study is to analyze Polish travelers' opinions about Armenia to identify good experiences as well as areas of discontent, and to specify terms and expressions used to describe Armenia as a tourism destination.

Discussion

On the initiative of “Armenia 2020” a thorough research on tourism sector was carried out by one of the world leading management consulting companies McKinsey&Co. As a result the main intrinsic assets were mentioned for tourism development in Armenia: history/culture, religion, nature, wellness, mountain skiing, adventure, urban culture, sun and beach⁸. Based on these resources, the main types of tourism in Armenia are:

1. Historical and cultural tourism. Armenia has an ancient history. Armenia lies in the highlands surrounding the Biblical mountain of Ararat, which is the resting place of Noah's Ark after the “great deluge”⁹. Armenia is very rich in historical, cultural monuments (more than 24,000), churches. The Cathedral and Churches of Etchmiadzin and the Archaeological Site of Zvartnots, Monasteries of Haghpat and Sanahin, Monastery of Geghard and the Upper Azat Valley are included in the World Heritage List of UNESCO. The archaeological site of the city of Dvin, the basilica and archaeological site of Yererouk, the monastery of Noravank and the upper Amaghov Valley, the monasteries of Tatev and Tatevi Anapat and the adjacent areas of the Vorotan Valley are submitted on the Tentative List¹⁰.
2. Religious tourism. Armenia was the first nation to adopt Christianity as a state religion (301 AD). The Armenian Church was founded by two of Jesus' twelve apostles - Thaddaeus and Bartholomew, who preached Christianity in Armenia between 40-60 AD. Because of these two founding apostles, the official name of the Armenian Church is called Armenian Apostolic Church. The Mother Cathedral of Holy Etchmiadzin was built and consecrated by St. Gregory the Illuminator and St. Trdat the Great in 303 AD¹¹. Armenia may become religious tourism center for Christian pilgrims with the most visited sites of Jerusalem, Rome and Santiago de Compostela in the world.
3. Wellness, resort tourism. There are 10 resorts in Armenia (Arzni, Tsakhkadzor, Jermuk, Hanqavan, Bjni, Dilijan, Sevan, Stepanavan, Syunig, Lori) all of which have natural curable resort resources: mineral

⁸ Armenia 2020 – Armenian tourism sector: growth potential and required action 2005, Yerevan, p. 13

⁹ History of Armenia., https://en.wikipedia.org/wiki/History_of_Armenia, accessed: November 2017.

¹⁰ UNESCO, Armenia: Properties inscribed on the World Heritage List. <http://whc.unesco.org/en/statesparties/am>, accessed: November 2017.

¹¹ The Armenian Church, Mother Cathedral. <http://www.armenianchurch.org/index.jsp?sid=1&id=2360&pid=4>, accessed: November 2017.

water, curable mud, turf, good conditions for climate therapy¹². Armenian resorts may become internationally known resort zones, as their resources are compared with universally known resort resources of Karlovy Vary, Zheleznovodsk, Pyatigorsk, Vichy, Abastuman, etc.

4. Sport tourism. Tsakhkadzor is the best place for sport lovers, snowboarders and ski riders in winter. For water sport for, sun and beach lovers Lake Sevan is the best place, being one of the most famous and largest mountainous lakes in the world (situated at 1,896 m altitude).
5. Eco- and agro- tourism. In Armenia one can see majestic mountains and plains, meadows, broad-leaved forests, botanic parks, plant and animal life. There are many agricultural festivals and farmer's fairs which attract tourists to Armenian villages. Thanks to it ecotourism and agritourism are becoming more and more popular.
6. Gastronomy tourism. Armenia attracts tourists thanks to its delicious cuisine. Armenian wine and brandy are well known. Our national dishes are barbeque and kebab, dolma, harisa, khash, qufta, ghaurma, fish ishkhani (trout), lavash (a soft, thin, flatbread, which is in UNESCO's Intangible Cultural Heritage List), etc.
7. Adventure tourism. It offers hiking and trekking tours in Armenia to climb to the highest point of Armenia - Mt. Aragats (4,095 m) with its four peaks, Mt. Ajdahak (3,957 m) with a fantastic lake in its crater, Mt. Khustup (3,210 m), Mt. Artanish (2,460 m) at the junction of Big and Small Sevan, wonderful rocks in Noravank gorge and in the canyon of the Hrazdan River, near the village of Bjni. Tourists may take a cycling trip along the perimeter of Lake Sevan (220 km), or visit the waterfalls of Lastiver.

As a summary it is worth indicating that Armenia is a specific tourism destination based on the main and peculiar tourism resources.

The Republic of Poland is a sovereign country in Central Europe with 38,634,007 population. The Polish Central Statistical Office (GUS) has recently published the official data about the Poles' travels abroad.

Table 2

Outbound tourism trips of Polish residents aged 15 and over by purposes of trips and countries of destination¹³

COUNTRIES		Total	Main purpose of the trip			
			holidays, leisure and recreation	business	visiting friends and relatives	other
in thousands						
TOTAL	2015	10,906.4	6,239.2	800.5	3,338.0	528.6
	2016	11,286.5	6,344.5	874.7	3,511.4	555.8
of which top 10 countries are						
Germany		2,310.1	481.2	296.5	1,415.8	116.6
Italy		936.1	717.0	35.7	107.4	76.0

¹² B. Harutyunyan, 2010, Atlas, climate and natural therapeutic resources of Armenia, p. 124-133 Yerevan: STPM (in Armenian).

¹³ Tourism in 2016, <http://stat.gov.pl/en/topics/culture-tourism-sport/tourism/tourism-in-2016,1,14.html>, accessed: November 2017.

United Kingdom	915.2	124.6	51.6	713.0	26.0
Croatia	661.3	643.1	3.3	1.2	13.6
Czech Republic	655.0	531.3	48.1	43.7	31.9
Greece	611.5	583.1	7.8	14.2	6.4
Spain	587.6	479.2	20.6	65.0	22.8
Austria	402.8	252.6	26.4	94.6	29.3
Slovakia	376.4	322.0	9.3	28.0	17.1
France	367.1	197.9	60.0	88.9	20.3

In 2016 the most visited countries by Poles were: Germany, Italy and UK¹⁴. The most popular tourism destinations for package holiday travelers were: Greece, Spain, Bulgaria, Turkey and Egypt¹⁵.

It is worth mentioning that the number of tourists from Armenia to Poland is not available, but only the number of visitors from Poland, which is obtained from border crossing points of the RA, based on the submitted documents.

Table 3

Number of visits from Poland to Armenia, 2013-2017 years¹⁶

	2013	2014	2015	2016	2017 January-September
Number of visits from Poland, people	7,295	10,974	9,275	8,903	10,645
Growth compared to last year, %	+53.3	+50.4	-15.4	-4.0	+31.3

According to the data presented in Tables 2 and 3, Armenia does not appear as a popular tourism destination for Polish tourists. However, some facilities have been already implemented. Citizens of the Republic of Poland with all types of passports are not required to hold a visa when travelling to the Republic of Armenia. They can stay in the territory of the Republic of Armenia for a maximum term of 180 days a year. The passport needs to be valid during the whole period of stay in the Republic of Armenia¹⁷. Yet, visiting the country without having to obtain a visa is not a sufficient condition to attract more visitors from Poland.

Due to a relatively small number of Polish tourists visiting Armenia, it is important to gather information about travelers' experiences and find out how they perceive the country as a tourism destination. Such information enables tourism managers to identify areas for improvement and to develop a better targeted communication strategy.

Method

The primary objective of this study is to analyze Polish tourists' perceptions of Armenia as a tourism destination. The research task included the identification of areas of satisfaction and dissatisfaction with regard to attributes valuable for tourists related to their package holiday experience. The analysis of the data in this study consists of a qualitative analysis of tourists' comments and

¹⁴ Ibidem.

¹⁵ Holidays Poland, <http://www.wakacje.pl>, accessed November 2017.

¹⁶ The information was provided by the State Tourism Committee of the Ministry of Economic Development and Investments of the RA .

¹⁷ Visa, <http://www.mfa.am/en/visa/>, accessed: November 2017.

opinions regarding their holiday experience in Armenia. The researchers examined tourists' opinions presented on the Rainbow Tours¹⁸ website¹⁹.

Tourists who presented their comments and opinions spent their holidays on coach tours in Armenia and Georgia between 2015–2017²⁰. Tourists' evaluations were carefully examined in order to identify good experiences as well as areas of discontent. The qualitative analysis is based on tourists' comments regarding their holiday experience with respect to main coach tours' attributes, including: tour program, standard of hotels, mean of transportation, tour guide, local guides, bus driver, restaurants and meals, countryside, tourist attractions and other areas of importance for travelers. 90 tourists made detailed comments about their holiday experience.

Empirical results

General opinions about Armenia were very positive. Tourists perceived Armenia as a fascinating and charming country. Many guests emphasized the natural beauty of the country as well as its ascetic, proud, and silent landscape with numerous monasteries. Terms such as severity, simplicity, and modesty were commonly used by tourists to describe their impressions of Armenia. It was also possible to find longer and more poetic expressions like: "Armenia seduces with a proud and silent monastery landscape", "A severe and beautiful world enchanted in stone with proud khachkars scattered everywhere", "Sacred monuments fabulously located", "Severe and mysterious monasteries in the beautiful mountainous surroundings".

A tour guide appears to be a crucial component of coach tours due to his/her numerous duties and tasks, having a significant impact on tourists' satisfaction. Travelers highly evaluated the tour guide's competences and knowledge. 67.8% of visitors emphasized the tour guide professionalism, excellent organizational skills, knowledge, enthusiasm, empathy and ability to create an unforgettable atmosphere during the tour. Moreover, tourists enjoyed the local guides' companionship describing them as friendly, cordial, helpful, and open. 42.2% of guests were impressed with the guides' friendliness and a positive attitude as well as their kindness and good-heartedness. Many visitors appreciated very good cooperation between a tour guide and local guides which contributed to the overall nice and pleasant ambiance.

A tour program plays a very important role as a satisfaction driver as well. It was highly rated and a tour was described as wonderful, well organized, with

¹⁸ Rainbow Tours is a leading Polish tour operator specializing in coach tours.

¹⁹ Rainbow, <https://r.pl/>, accessed: November 2017.

²⁰ Rainbow Tours offers the following tours which include Armenia: 1) Georgia and Armenia – From the top of the Caucasus to the Armenian valley (Monasteries of Haghpat and Sanahin (listed in UNESCO), lake Sevan, Geghard Monastery, Tatev, Zorac Karer) (about 1,150 euro for 15 days); 2) Georgia, Azerbaijan and Armenia – Time for Caucasus (Haghpat Monastery, lake Sevan, Brandy factory in Yerevan, Geghard Monastery, Etchmiadzin – Armenian Vatican) (about 1,340 euro for 15 days), 3) Georgia, Armenia - Armenian world (Haghpat Monastery, lake Sevan, Brandy factory in Yerevan, Geghard Monastery, Etchmiadzin – Armenian Vatican) (about 795 euro for 8 days), 4) Iran, Georgia, Armenia - Persian rugs colors (Tatev Monastery, Ughtasar, Djermuk, Areni – Valley of wine, Yerevan, Mount Aragats, Garni – Temple of God Mitra, Sevan) (about 1600 euro for 13 days), 5) Armenia, Azerbaijan, Georgia, Iran – Caucasian Quartet (Fantastic monasteries of Armenia, Yerevan – the city of pink tuf stone) (about 1,550 euro for 13 days), Rainbow, <https://r.pl/armenia?frazja=Gruzja+Armenia>, accessed: December 2017.

numerous and diverse attractions. 60% of travelers commented on a tour’s itinerary, e.g. “The tour was a great way to experience monuments, nature, history and culture of Armenia”, “The tour program, visited places, architecture, countryside, local people, guides, driver, and local cuisine – everything was excellent”, “The tour was a combination of visiting monuments with the beauty of nature”. Despite numerous positive comments, some negative opinions were expressed as well. Some tourists were disappointed with the quality of sanitary facilities on the way (16.7%), poor tourism infrastructure (8.9%), the quality of local roads (8.9%), and too long bus rides (7.8%).

Table 4

The most repeated tourists’ comments regarding their holiday experience

<i>Positive comments</i>	<i>% of indications</i>	<i>Negative comments</i>	<i>% of indications</i>
Excellent, knowledgeable tour guide	67.8	Poor sanitary facilities	16.7
Interesting, diversified, great tour program	60.0	Uncomfortable coach	11.1
Delicious, diversified, very tasty meals	57.8	Lack of a toilet on the bus	11.1
Nice, clean, comfortable hotels	56.7	Poor quality of roads	8.9
Beautiful countryside and nature	44.4	Poor tourism infrastructure	8.9
Nice, friendly, helpful local guides	42.2	Long bus rides	7.8
Very good bus driver	40.0	Uncomfortable hotel rooms	7.8
Clean, efficient coach with air condition	26.7	Health, stomach problems	7.8
Unique monuments and monasteries	24.4		
Nice, friendly, hospitable people	22.2		
Rich culture	17.8		

Hotels and restaurants are also important components of a holiday experience. In both cases tourists were satisfied with the quality of delivered services. 57.8% of visitors mentioned their appreciation for local cuisine. Opinions such as “delicious regional dishes”, “tasty and varied food”, “healthy and fresh homemade food” often appeared in travelers’ comments. However, some of visitors experienced health and stomach problems (7.8%). The evaluations of hotels were in the majority of cases positive. 56.7% of guests described hotels as nice, clean and cozy with competent and helpful personnel. Some negative comments appeared (7.8%), but they were related to different issues like quality standards, humidity, and air condition, so their importance is marginal.

Means of transportation as well as driver’s qualifications contribute to the overall holiday experience of coach tours, as much time is spent on a bus. 40% of tourists were impressed by the bus driver’s professionalism of a bus driver. Moreover, they appreciated driver’s calmness, kindness and amiability. Many visitors stressed the driver’s ability to cope with narrow, winding, and mountain roads with an uneven surface and holes. The bus was described as clean, well maintained, with working air condition (26.7%), however, some travelers were disappointed with the lack of a toilet on the bus (11.1%) and limited comfort (11.1%).

It is important to notice that coach tours enable tourists to explore the country’s history, culture, nature as well as other social, economic, and cultural aspects. Here, tourists were impressed by the beautiful countryside and nature

(44.4%), unique Armenian monuments and monasteries (24.4%) as well as rich culture (17.8%). The expressions such as “breathtaking landscapes”, “unearthly and unforgettable views”, “beautiful, severe and mysterious monasteries”, “the beauty of monuments and culture” appeared frequently in tourists’ comments. Travelers perceived Armenians as very nice, cordial, open and hospitable people (22.2%), able to communicate in English and Russian. They described Armenia as a safe country, undamaged by mass tourism, uncrowded by tourists and not as commercialized as European countries, the country where visitors could feel welcome.

Conclusions

Armenia appears to be an attractive tourism destination with high potential for development due to its rich history and culture, beautiful nature and countryside, as well as good tourism infrastructure and other important resources. The main types of tourism include: historical and cultural tourism, religious tourism, wellness and resort tourism, sport tourism, eco- and agro-tourism, gastronomy tourism, and adventure tourism.

The analysis of Polish tourists’ perceptions of Armenia shows that this country is a beautiful and hospitable tourism destination. In addition, prices of meals, accommodation and transport are affordable for tourists. Armenia may become a very popular tourism destination in the world based on its tourism assets, natural resources and old history. Yet, more investment in tourism infrastructure and development of a better targeted communication strategy are crucial for attracting more visitors.

Here are some suggestions for development on the basis of the conducted analysis:

Due to repeated tourists’ concerns regarding poor sanitary facilities, this area undoubtedly needs improvement. Moreover, investment in overall tourism infrastructure with the emphasis on development of transportation infrastructure would increase Armenia’s competitiveness as a tourism destination. It is important to note that safety and cleanliness are listed among the most important factors influencing tourists’ destination choices.

The research results are helpful to better position Armenia as a tourism destination to improve its tourist image and attractiveness. Such tourism attributes as: beautiful countryside and nature; rich cultural and historical heritage; delicious regional cuisine; as well as nice, friendly and hospitable people seem to be significant points of differentiation. Moreover, contrast with European tourism destinations could be used also to differentiate Armenia from western countries because it is perceived as much less touristy and commercialized.

The research results also show that offered tours include mostly the historical and cultural tourism activities. However, as it is discussed in the article, Armenia with its touristic assets may also offer narrower, specialized tours such as: religious, adventure, winter sports, wellness, gastronomic, eco- and agro- tours. It is also possible to develop more diverse package tours by combining some types of these activities.

Another conclusion drawn from the research is that it is important to develop a better targeted communication strategy aimed at increasing the country's brand awareness to attract more visitors from European countries including Poland. It would be reasonable to consider promoting Armenia along with Georgia or the Caucasus as a whole region, as many tourists visit several countries during one trip.

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ԳԱՅԱՆԵ ԹՈՎՄԱՍՅԱՆ

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Հայաստանը որպես զբոսաշրջային ուղղություն լեռ զբոսաշրջիկների համար.–

Հայաստանը զբոսաշրջության գրավիչ վայր է, որն ունի զարգացման մեծ ներուժ՝ հարուստ պատմություն և մշակույթ, գեղեցիկ բնություն և գյուղական միջավայր, ինչպես նաև զբոսաշրջության ենթակառուցվածք և այլ կարևոր ռեսուրսներ: Ջրոսաշրջության հիմնական տեսակներից են պատմամշակութային, կրոնական, առողջարանային, սպորտային, արկածային, գաստրոնոմիական, էկո- և ագրո-զբոսաշրջությունները: Հոդվածում ներկայացվել են ոլորտի ներկա վիճակը և զբոսաշրջային հիմնական ակտիվները ՀՀ-ում: Վերլուծվել են լեռ զբոսաշրջիկների ընկալումները Հայաստանի՝ որպես զբոսաշրջային ուղղության վերաբերյալ՝ նրանց գոհունակության ու դժգոհության աստիճանը և ոլորտները պարզելու համար: Որակական վերլուծությունը հիմնված է 90 զբոսաշրջիկի մեկնաբանությունների վրա: Ըստ վերլուծության արդյունքների կատարվել են որոշ առաջարկություններ զբոսաշրջության զարգացման նպատակով:

Հիմնաբառեր. զբոսաշրջություն, ուղղություն, ակտիվներ, տուր, ընկալում, բավարարվածություն:

JEL: L83, O14, Z10

ГАЯНЕ ТОВМАСЯН

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Армения как туристическая дестинация для польских туристов.–

Армения - привлекательное туристическое направление с большим потенциалом для развития: с богатой историей и культурой, красивой природой и сельской местностью, а также хорошей туристической инфраструктурой и другими важными ресурсами. Основными видами туризма являются: исторический и культурный туризм, религиозный туризм, оздоровительный и курортный туризм, спортивный туризм, эко- и агротуризм, гастрономический туризм и приключенческий туризм. В статье представлено текущее состояние сферы и основные туристические активы. Анализируется восприятие польских туристов, чтобы узнать степень удовлетворенности и неудов-

летворенности. Качественный анализ основан на отзывах 90 туристов. В конце сделаны некоторые предложения для развития на основе анализа.

Ключевые слова: *туризм, дестинация, активы, тур, восприятие, удовлетворение.*

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