



USAID
FROM THE AMERICAN PEOPLE

ARMENIAN INTERNATIONAL VISITOR SURVEY SEPTEMBER 2006 – AUGUST 2007 REPORT OF RESULTS

FEBRUARY 2008

This publication was produced for review by the United States Agency for International Development, the Armenian Tourism Development Agency, Ministry of Trade & Economic Development and the National Statistical Service of the Republic of Armenia. It was prepared by Jessica Reynolds as part of the Competitive Armenian Private Sector Project (CAPS).



ARMENIAN INTERNATIONAL VISITOR SURVEY SEPTEMBER 2006 – AUGUST 2007 REPORT OF RESULTS

DISCLAIMER: The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

TABLE OF CONTENTS

TABLE OF CONTENTS	3
DEFINITIONS	4
1. EXECUTIVE SUMMARY	5
1.1. DEPARTURE SURVEY.....	5
1.2. ARRIVAL SURVEY.....	6
2. BACKGROUND	7
3. METHODOLOGY	7
4. DEPARTURE SURVEY RESULTS	8
4.1. VISITOR PROFILE.....	8
4.1.1. <i>Country of Citizenship</i>	8
4.1.2. <i>Purpose of Visit</i>	9
4.1.3. <i>Reasons for Choosing Armenia for Holidays</i>	10
4.1.4. <i>Age and Gender</i>	11
4.1.5. <i>Repeat Visits</i>	12
4.1.6. <i>Sources of Information</i>	13
4.2. TRAVEL BEHAVIOR PATTERNS.....	15
4.2.1. <i>Internet Bookings and Travel Arrangements</i>	15
4.2.2. <i>Accommodation</i>	17
4.2.3. <i>Length of Stay</i>	20
4.2.4. <i>Places Visited</i>	21
4.2.5. <i>Distribution of Tourist Nights</i>	23
4.3. VISITOR RATINGS.....	24
4.3.1. <i>Rating of Facilities & Services</i>	24
4.3.2. <i>Interest in Visiting Armenia Again</i>	25
4.3.3. <i>Recommendation of Armenia as a Holiday Destination</i>	26
4.4. VISITOR EXPENDITURE.....	27
4.4.1. <i>Average Expenditure per Person & Daily Receipts</i>	27
4.4.2. <i>Average Itemized Expenditure for Tourists on Own Travel Arrangements</i>	31
5. ARRIVAL SURVEY RESULTS	34
5.1. VISITOR PROFILE.....	34
5.1.1. <i>Country of Citizenship</i>	34
5.1.1. <i>Country Visited</i>	34
5.1.3. <i>Age & Gender</i>	35
5.2. TRAVEL BEHAVIOR PATTERNS.....	37
5.2.1. <i>Travel Arrangements</i>	37
5.2.2. <i>Accommodation</i>	37
5.2.3. <i>Length of Stay</i>	38
5.3. VISITOR EXPENDITURE.....	39
5.3.1. <i>Average Expenditure per Head and Daily Expenditure</i>	39
5.3.2. <i>Average Itemized Expenditure</i>	43
5.3.3. <i>Financing of Trip</i>	46
5.3.4. <i>Profit Received</i>	47
6. OBSERVATIONS AND CONCLUSIONS	48
ANNEX 1. DEPARTURE SURVEY QUESTIONNAIRE	50
ANNEX 2. ARRIVAL SURVEY QUESTIONNAIRE	55

DEFINITIONS

CIS Countries: Includes “Other CIS” countries, Russia and Georgia.

Holidaymakers: Holiday, vacation or leisure tourists.

Holiday/Leisure Visitors/Tourists: Holidaymakers

Middle East: Includes the source markets of Syria, Lebanon, and Iran.

North America: Comprises the US and Canada.

Other CIS: Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Tajikistan, Turkmenistan, Ukraine, Uzbekistan

Other Western Europe: Comprises the countries of Andorra, Austria, Belgium, Denmark, Finland, Ireland, Liechtenstein, Luxembourg, Malta, Netherlands, Norway, Portugal, Spain, Switzerland, and Sweden.

Tourists: People travelling to and staying in places outside their usual environment for not less than 24 hours and not more than one consecutive year for leisure, treatment, visiting relatives, business, religious and other purposes not related to the exercise of an activity remunerated from within the place visited, in which case the payments for travel would be made from financial means received for activities exercised within the place visited.

Travelers: Tourists

Visitors: Used interchangeably with the term ‘Tourists’ for the sole purpose of this report – although the official definition used by the UNWTO is different.

Western Europe: Comprises the UK, France, Germany, Italy, and “Other Western Europe” countries.

1. EXECUTIVE SUMMARY

1.1. DEPARTURE SURVEY

The Departure Survey was conducted to examine the international travel behavior of foreign tourists visiting Armenia. The visitor profile demonstrated that Russia, Georgia, other CIS countries, and Iran had the highest percentages of tourists visiting, followed by Western Europe and North America. It was evident that tourists with Armenian ancestry also comprised a large percentage of total tourists, so it is logical that visiting friends and relatives was the main reason for travel to Armenia.

After visiting friends and relatives, business and holiday/leisure were the most significant purposes of travel. Holidaymakers were more likely to be from North America, Western Europe, Japan, and the Middle East, while Russia and CIS countries were less likely to be holidaymakers. The main reasons selected by holiday/leisure interviewees for choosing Armenia as a tourist destination were nature, followed by historical and cultural attractions; however, Armenian heritage and ecotourism/adventure tourism had a strong role in the market as well.

Men comprised a strong majority of all visitors, except among friends and relatives tourists and health treatment tourists, which had a majority of women. The primary age group was 36-55, however these tourists were not as likely to visit for holiday/leisure. Those aged 55 and over were more likely to be holidaymakers, although they constituted lower numbers.

Armenia had a very high incidence of repeat visits, especially among those with Armenian ancestry, and most repeat visitors visited friends and relatives. Based on the fact that many tourists from Georgia and Russia had Armenian ancestry, it is logical that these two countries had the highest occurrence of repeat visits.

The main sources of information used by tourists to Armenia were friends and relatives, and previous visits, which indicates a low representation of Armenia in other tourism marketing channels.

There was also very low usage of the Internet in booking travel arrangements, with the UK and Italy utilizing the Internet the most, and Georgia and Japan utilizing the Internet the least. Holidaymakers were also more likely than other groups to use the Internet for travel arrangements.

Tourists from Japan, North America, and Western Europe were most likely to use tour operators to plan their trip, as were, understandably, holidaymakers. This group (plus Iran) was also more likely to stay in hotels. Nonetheless, most tourists stayed with friends and relatives, with Russian and Georgian visitors, friends and relatives visitors, and visitors with Armenian ancestry most likely to stay in this type of accommodation.

The longest stays were among tourists visiting for employment, education, health treatment, and visiting friends and relatives, and the shortest stays were among holidaymakers and business travelers. Most tourists were likely to stay between 4-7 nights, followed by 22+ nights. Russians were most likely to stay 22+ nights, while the neighboring countries of Iran and Georgia were most likely to stay 1-3 nights.

Yerevan was the most visited location, while Nagorno Karabagh and Syunik Marz were the least visited locations. Holidaymakers, understandably, were most likely to visit multiple locations, while employment visitors were least likely to visit more than one location. Canadians had the most extensive travels within Armenia, visiting the most locations during their stay, while the neighboring countries of Georgia and Iran visited the least.

Yerevan also had the highest percentage of tourist nights, followed by Shirak Marz. However, visitors to Shirak Marz were primarily visiting friends and relatives and therefore their accommodation spending was likely insignificant. It also follows, then, that visitors with Ar-

menian ancestry and those visiting friends and relatives were less likely to spend time in Yerevan.

Tourists rated Armenia good overall, with the best ratings in the areas of attractions and spas, but the lowest ratings in the areas of roads and value for money. The vast majority of visitors were interested in visiting Armenia again, although Germans and holidaymakers were slightly less likely than other groups to be interested in returning. The bulk of all visitors would also recommend Armenia to friends and relatives, although Lebanese and again, German visitors, were slightly less likely to do so based on their responses to the survey.

Visitors coming to Armenia via package tours spent the most money in total and per day. Canadian and Japanese tourists spent the most, while Georgians and Iranians spent the least, during their time in Armenia. As indicated in other sections, visitors with Armenian ancestry and friends and relatives visitors spent less overall during longer periods of time. Holidaymakers spent the most and doubled that spending when visiting through package tours.

International transportation comprised the largest portion of visitor expenditure, while accommodation, restaurants, organized tours, and souvenirs did not constitute very large amounts of spending. Holidaymakers spent more on international transportation and accommodation since they were more likely to come from farther away and less likely to stay with friends and relatives. "Other" spending was significant, especially among Russians and other CIS countries.

1.2. ARRIVAL SURVEY

The Arrival Survey was conducted to examine the international travel behavior of Armenian residents. It is therefore not surprising that 97% of all Armenian residents had Armenian citizenship. Russian citizens residing in Armenia comprised 1.5% of the total. Most Armenian residents travelled to Georgia, Russia and Iran which is not surprising given that Georgia and Iran directly border Armenia, and Russia has a high Diaspora population.

Men comprised the large majority of outbound travelers, except among those visiting friends and relatives and education travelers. The 36-55 age range comprised the largest portion of travelers, and this group was more likely to travel for business and employment while holiday/leisure travelers were most likely to be 18-35, and health treatment visitors were most likely to be over 55 years old.

Most travelers did not use a tour operator to arrange their travel, but those visiting Italy and Greece had the strongest usage of tour operators among all destinations visited, and holidaymakers were also more likely to use tour operators to book travel.

Rental apartments were the most utilized form of accommodation overseas; however, this was primarily due to employment and education travelers who stayed for long periods of time. After the rental apartments, the homes of friends and relatives were the next most utilized type of accommodation. Hotels represented the shortest stays, most likely because business travelers, sport and cultural event visitors, and holidaymakers were most likely to have shorter stays. Visitors to neighboring countries (Georgia and Iran) had the shortest stays, while visitors to Russia, Greece, and North America had the longest stays.

Armenian residents spent the most per day in "other" countries and Western European countries while travelers to Georgia, other CIS countries, and Greece spent the least. Expenditures were higher among those traveling on package tours.

Resale goods made up a significant proportion of spending among those visiting Japan and Lebanon, although this was primarily among business travelers and visitors for "other" purposes. Business travelers also had the highest daily expenditures, while health treatment visitors had the highest total expenditures. Expenditure prior to departing Armenia was spent primarily on international travel, especially among those travelers visiting countries far from Armenia. "Other" expenditure was also a large percentage of spending prior to traveling, and was highest among travelers visiting friends and relatives. The "other" category also hap-

pened to be the largest percentage of spending once overseas, and is particularly high among health treatment and friends and relatives visitors. Items for resale were also a large percentage of spending overseas.

The majority of travelers interviewed financed their own trip, but a significant proportion was also financed by friends and relatives (especially those visiting friends and relatives and health treatment travelers). Most travelers did not receive any profit while overseas, although those who visited Iran and Greece were most likely to earn profit, as were employment and business travelers, logically.

2. BACKGROUND

The purpose of this visitor survey was to identify the profiles, travel behaviors, satisfaction and expenditure of foreign tourists visiting Armenia and the profiles, travel behaviors and expenditure of Armenian residents travelling to overseas destinations. The design of the survey and data collected will, in the future, assist in the development of a tourism satellite accounting system; a model designed to measure the economic impact of tourism on host countries.

This survey data enables more significant understanding of Armenia's tourism industry by the government and private sector and assists in tourism planning, product development, policy making and promotional techniques.

The survey design and implementation was undertaken through a collaborative effort between the National Statistical Service, Ministry of Trade & Economic Development, the Armenian Tourism Development Agency, and the Competitive Armenian Private Sector Project, with financial support from USAID and the RA Government.

A similar survey was undertaken by the RA National Statistical Service (duration of 3 months) in 2002 through the assistance of TACIS.

3. METHODOLOGY

The survey of departing foreign tourists and arriving Armenian tourists commenced on September 1st 2006 and was completed on August 31st 2007. The survey questionnaires and methodology were approved by the state board of the RA Statistical Service.

Interviews were undertaken by 31 trained interviewers at Zvartnots Airport in Yerevan, at the airport in Gyumri and at the border points of Bagratashen, Bavra, Gogavan, Ayrum and Megri. Translations of the departure questionnaires were provided in English, French, German, Russian, Persian, Spanish and Chinese. Questionnaires were collected, checked, coded and tabulated by the National Statistical Service.

A random sampling methodology was applied to the survey, with approximately 3% of all arriving and departing tourists interviewed (every 5th person passing through immigration control during the survey days). The interviews were undertaken every month for 7 full days. The survey questionnaires used, are attached as appendices to this report. The survey and methodology was targeted at 'tourists' as defined by the UN World Tourism Organization, although in this instance, due to purely statistical objectives (for "travel" article of Balance of Payments), data collected also included those travelling for employment.

4. DEPARTURE SURVEY RESULTS

4.1. VISITOR PROFILE

4.1.1. Country of Citizenship

Table 1: Country of Citizenship – Highest Percentages of Tourists

Country	Total Number of Tourists	Percentage of Total Tourists	Total Number of Tourists with Armenian Ancestry	Percentage of Total Tourists with Armenian Ancestry	Percentage of Each Citizenship with Armenian Ancestry
Armenia	891	11.7	879	18.5	98.7
Canada	56	0.7	38	0.8	67.9
France	264	3.5	131	2.8	49.6
Georgia	2135	28.0	1457	30.7	68.3
Germany	215	2.8	50	1.1	23.3
Greece	60	0.8	33	0.7	55.0
Iran	595	7.8	178	3.8	29.9
Italy	55	0.7	5	0.1	9.1
Japan	42	0.6	1	0.0	2.4
Lebanon	32	0.4	28	0.6	87.5
Russian Federation	1883	24.7	1438	30.3	76.4
Syrian Arab Republic	89	1.2	64	1.3	71.9
United Kingdom	138	1.8	35	0.7	25.4
United States	336	4.4	165	3.5	49.1
Other CIS Countries	222	2.9	114	2.4	51.4
Other Western Europe	242	3.2	54	1.1	22.3
All Other Countries	372	4.9	76	1.6	20.4
Total	7627	100	4746	100	62.2

* including those traveling for employment

In general, Russia and CIS countries, North America, Western Europe, and the Middle East (including Iran) provided the highest numbers of tourists, in terms of citizenship, arriving in Armenia while countries in Africa, Asia, Oceania, and Latin America had the lowest numbers. Russia and CIS citizens had the greatest percentage of tourists traveling to Armenia, with Georgia accounting for 28%, Russia accounting for 24.7%, and other CIS countries accounting for 2.9%. Western European countries (including Italy, France, Germany, etc.) constituted 12.8% of tourists to Armenia and North America contributed another 5.1%.

Armenians were also a highly represented citizenship at 11.7%, although it should be noted that all of these Armenian tourists were residing in other countries at the time of the survey, most notably Russia (85.6%), and to a lesser degree, the US, Georgia, France, and Germany. Armenian ancestry was an important aspect of the tourist profile, as 62.2% of all tourists to Armenia had Armenian ancestry.

The trend suggests that tourists from former Soviet territories and neighboring countries (and possibly countries with higher Diaspora populations) are more likely to visit Armenia.

Table 2: Country of Residence – Highest Percentages of Tourists

Country	Total Number of Tourists	Percentage of Total Tourists	Total Number of Tourists with Armenian Ancestry	Percentage of Total Tourists with Armenian Ancestry	Percentage of Each Residence with Armenian Ancestry
Canada	55	0.7	38	0.8	69.1
France	270	3.5	144	3.0	53.3
Georgia	2143	28.1	1470	31.0	68.6
Germany	222	2.9	59	1.2	26.6
Greece	64	0.8	37	0.8	57.8
Iran	592	7.8	177	3.7	29.9
Italy	65	0.9	10	0.2	15.4
Japan	40	0.5	1	0.0	2.5
Lebanon	37	0.5	33	0.7	89.2
Russian Federation	2660	34.9	2188	46.1	82.3
Syrian Arab Republic	88	1.2	63	1.3	71.6
United Kingdom	145	1.9	36	0.8	24.8
United States	347	4.5	186	3.9	53.6
Other CIS	235	3.1	136	2.9	57.9
Other Western Europe	231	3.0	67	1.4	29.0
All Other Countries	433	5.7	101	2.1	23.3
Total	7627	100.0	4746	100.0	62.2

There are few differences in the arrivals from source markets by citizenship and residency. Russia's tourist arrivals are higher by residency than citizenship highlighting the large number of Armenian citizens residing in Russia.

4.1.2. Purpose of Visit

Table 3: Purpose of Visit by Market Area (%)

Purpose of Visit	USA	Canada	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe*	Lebanon	Syria	Iran	All Other Countries	Total Average
Business / Conference	29.1	27.3	30.0	14.3	19.6	24.3	14.1	32.3	54.5	22.6	35.6	37.9	10.8	18.2	31.0	41.7	22.4
Employment	3.2	1.8	7.5	1.5	1.0	3.4	3.1	12.3	6.2	3.0	4.1	4.0	0	1.1	37.6	4.1	4.8
Education	0	0	0	0.3	2.9	2.1	0	0	0.7	0	2.3	0.6	5.4	13.6	4.4	3.1	1.8
Health Treatment	0	0	0	3.7	7.2	2.1	1.6	0	0	0.7	0	0.6	0	1.1	1.0	1.0	3.6
Holiday & Leisure	24.2	36.4	50.0	3.8	7.7	6.4	31.3	30.8	22.1	35.9	31.1	29.3	35.1	20.5	6.8	24.5	11.6
Active Participation at Sport or Cultural Events	2.9	3.6	5.0	1.2	0.6	0.9	1.6	7.7	2.8	1.9	2.7	5.2	2.7	3.4	0.7	3.7	1.5
Visiting Friends or Relatives	33.1	23.6	0	63.8	48.4	50.2	45.3	9.2	13.1	32.6	20.3	15.5	35.1	36.4	15.9	17.2	44.8
Other	6.9	7.3	7.5	11.3	12.7	10.6	3.1	7.7	0.7	3.0	3.6	6.9	10.8	5.7	2.7	4.7	9.4

*Andorra, Austria, Belgium, Denmark, Finland, Ireland, Liechtenstein, Luxembourg, Malta, Netherlands, Norway, Portugal, Spain, Switzerland, Sweden

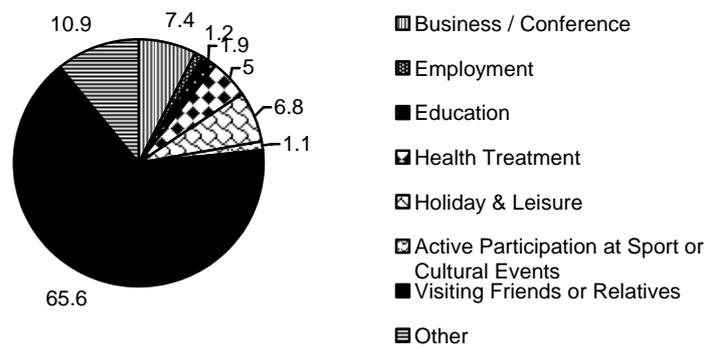
The primary reason for travel to Armenia, for all nationalities, was to visit friends and relatives. This accounted for 44.8% of all travel. Business travel and conferences also brought in a high percentage of tourists at 22.4%. Holiday/leisure travel was the third reason for traveling to Armenia, at 11.6%. Other reasons for travel included employment (4.8%), education (1.8%), health treatments (3.6%), participation in sport or cultural events (1.5%), and other purposes (4.7%).

The majority of those tourists traveling for holiday/leisure were from North America and Western Europe. Japan, Lebanon, and Syria also had high percentages of tourists traveling for holiday/leisure. Russia, Georgia, and other CIS countries, while representing the highest overall percentages of tourists, had very low numbers of holidaymakers, at 3.8%, 7.7%, and 6.4% respectively, but had the highest percentages of tourists visiting friends and relatives, and were also the most significant source markets visiting Armenia for health treatments.

The country with the highest percentage of business tourists was the UK (54.5%), however, the country with the highest percentage of travelers for the purpose of employment was Iran (37.6%). The majority of students came from Syria (13.6%) and other regional countries, such as Iran and Lebanon.

This information supports the knowledge that neighboring countries and nations formerly under Soviet rule have strong connections with Armenia, either due to shared history or, for more practical reasons, such as the ability to travel without a visa. This is particularly true for employment, education, and health treatment travelers. A large percentage of those coming to visit friends and relatives were from the Diaspora, especially among visitors from Russia, Georgia, and other CIS countries, as further illustrated below.

Chart 1: Purpose of Visit for those with Armenian Ancestry (%)



Tourists with Armenian ancestry were less likely than the average tourist to visit for holiday/leisure or business (only 6.8% and 7.4% respectively), but were, understandably, more likely to travel to visit friends and relatives (65.6%) than the average tourist.

4.1.3. Reasons for Choosing Armenia for Holidays

Table 4: Main Reasons for Holiday Tourists Choosing Armenia by Market Area (%)

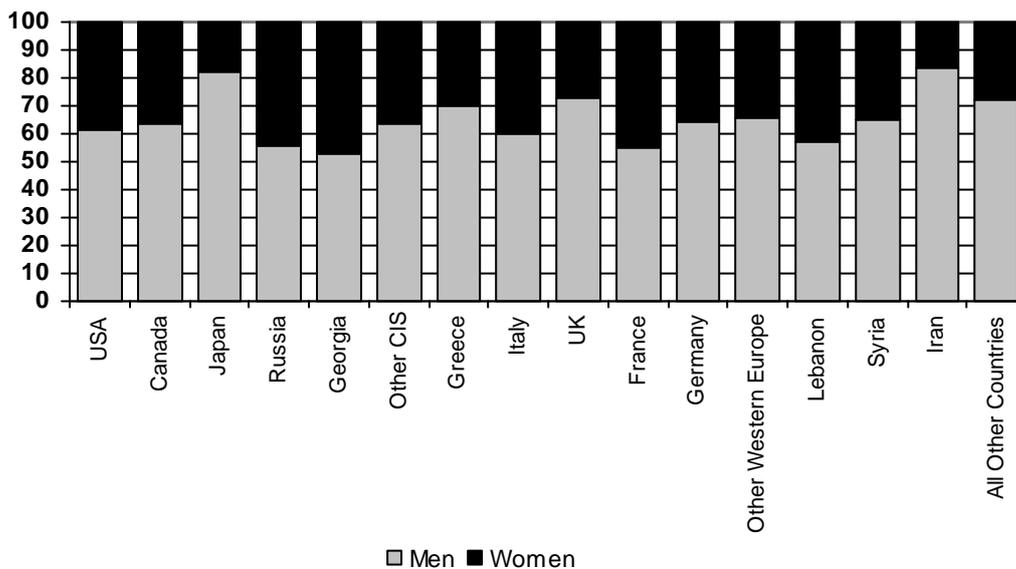
Reason for Holiday Travel	USA	Canada	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Nature	65.4	45.0	66.7	60.6	78.0	78.6	68.4	65.0	66.7	68.1	72.1	70.7	50.0	66.7	64.7	69.4	68.6
Historical / Cultural Attractions	67.9	55.0	66.7	39.4	39.0	50.0	73.7	65.0	66.7	84.0	77.9	62.7	41.7	50.0	38.2	72.9	59.3
Pilgrimage	6.4	35.0	5.6	3.2	15.1	7.1	26.3	5.0	3.3	14.9	1.5	1.3	8.3	27.8	0	4.7	8.8
Special Interest Tours	3.8	5.0	5.6	4.3	8.8	21.4	10.5	0	6.7	4.3	7.4	5.3	0	11.1	0	14.1	6.8

Reason for Holiday Travel	USA	Canada	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Ecotourism / Adventure Tourism	3.8	0.0	5.6	17.0	15.1	21.4	15.8	20.0	3.3	12.8	19.1	13.3	0	11.1	8.8	10.6	12.4
Armenian heritage	25.6	25.0	5.6	10.6	8.2	21.4	36.8	25.0	20.0	29.8	25.0	14.7	16.7	11.1	8.8	27.1	18.6
Other	9.0	45.0	5.6	20.2	6.3	14.3	5.3	0.0	6.7	1.1	2.9	6.7	50.0	16.7	17.6	5.9	9.4

Respondents were able to select multiple reasons for visiting Armenia; however, nature was by far the main reason that holidaymakers visited Armenia with 68.6% of respondents stating this as their motive for travel, with historical and cultural attractions also being a primary reason for holiday travel, at 59.3%. Armenian heritage (18.6%) and Adventure Tourism/Ecotourism (12.4%) were also significant reasons that tourists visited Armenia. Pilgrimage and other special interest tours were not a substantial part of the market.

4.1.4. Age and Gender

Chart 2: Gender by Market Area (%)



Men were more likely to visit Armenia, averaging 59.9% of all visitors and the distribution pattern was similar for all source markets. Many countries targeted by the Armenian tourism industry (Russia, UK, US, Italy, France), and those countries with high numbers of tourists traveling to Armenia, had at least a 20% gap between male and female travelers.

Table 5: Age & Gender by Purpose of Visit (%)

Gender & Age	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
Men	81.1	85.4	60.9	39.9	56.3	66.7	49.3	57.2	59.9
Women	18.9	14.6	39.1	60.1	43.7	33.3	50.7	42.8	40.1
Total	100	100	100	100	100	100	100	100	100
17 or Younger	0.1	0.3	6.5	0.7	0.3	0.9	2.0	0.7	1.2

Gender & Age	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
18 – 35	27.6	29.9	82.6	18.5	33.8	62.4	24.5	25.4	28.0
36 – 55	63.3	62.2	7.2	56.2	46.6	24.8	54.6	57.9	55.0
56 and Over	9.0	7.6	3.6	24.6	19.3	12.0	18.9	16.0	15.7
Total	100	100	100	100	100	100	100	100	100
Average Age	41.1	40.4	27.9	45.0	41.4	34.7	42.6	42.4	41.7

While women comprised only 40.1% of tourists, they did however make up a slight majority of travelers visiting Armenia to see friends and relatives, and had a significant lead over men for health-related travel (60.1%). The vast majority of business travelers (81.1%) were men.

The primary age group traveling to Armenia was the 36-55 age range, making up 55% of tourists and these travelers were most likely to visit for business or employment, health treatment, and visiting friends and relatives. Travelers aged 18-35 comprised 28% of all tourists, and were more likely than other groups to travel to Armenia for education and sports and cultural events. Tourists aged 55 and over composed only 15.7% of all tourists, and were most likely to travel for health treatments, holiday/leisure, and visit friends and relatives.

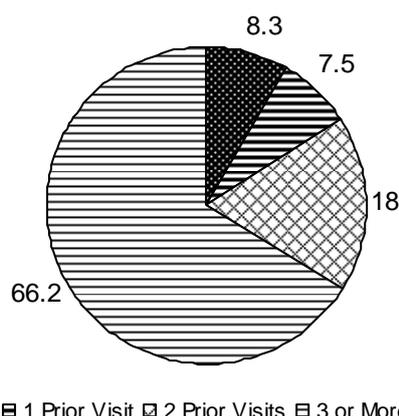
There was not a significant difference in the age or gender distribution among those visitors of Armenian descent.

4.1.5. Repeat Visits

Table 6: Repeat Visits by Market Area (%)

Number of Prior Visits	USA	Canada	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
None	34.9	52.7	60.5	10.6	10.5	24.8	27.0	58.5	43.8	42.6	47.0	54.2	20.6	28.2	13.7	46.9	20.0
1 Prior Visit	17.3	10.9	31.6	8.9	5.9	13.2	15.9	13.8	17.4	20.0	18.3	21.0	20.6	11.8	4.6	13.3	10.0
2 Prior Visits	21.0	18.2	5.3	20.9	14.2	17.9	12.7	12.3	17.4	19.3	13.7	9.2	20.6	22.4	16.4	14.9	17.3
3 or More Prior Visits	26.8	18.2	2.6	59.7	69.4	44.0	44.4	15.4	21.5	18.1	21.0	15.6	38.2	37.6	65.4	24.9	52.7
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Chart 3: Repeat Visits for Those with Armenian Ancestry (%)



Armenia is definitely a country that inspires multiple visits, since 52.7% of all tourists, and 66.2% of tourists with Armenian ancestry, have visited the country 3 or more times. Among the different source markets, those countries that were in closest proximity to Armenia were most likely to have visited multiple times, with Russia, Georgia, and Iran having the highest percentages (above 55%) of tourists with 3 or more visits.

Travelers coming to Armenia for the first time were also substantial, with 20% of all travelers falling into this category, although this did not apply to those with Armenian ancestry, of which only about 8% travelled for the first time. Western Europe and North America both had the most significant numbers of all tourists visiting Armenia for the first time, ranging from about 35-50% of all tourists. This percentage was also lower among those of Armenian descent.

Table 7: Repeat Visits by Purpose of Visit (%)

Number of Prior Visits	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
None	26.3	20.7	9.7	15.1	54.6	43.1	8.7	15.4	20.0
1 Prior Visit	14.4	5.4	7.5	9.6	17.7	16.4	6.5	9.1	10.0
2 Prior Visits	19.3	13.6	11.2	20.7	12.0	14.7	17.5	20.3	17.3
3 or More Prior Visits	40.1	60.3	71.6	54.6	15.8	25.9	67.3	55.2	52.7
Total	100	100	100	100	100	100	100	100	100

The reason for visiting Armenia multiple times (3 or more) was most likely to be for visiting friends and relatives (67.3%), employment (60.3%), education (71.6%), and health treatment (54.6%), whereas the primary reason for visiting Armenia for first-time tourists was holiday/leisure (54.6%) or sport and cultural events (43.1%). Those with Armenian ancestry were more likely than the average tourist to visit Armenia multiple times for any purpose; otherwise the distribution among this group was not significantly different.

4.1.6. Sources of Information

Table 8: Sources of Information by Market Area (%)

Source of Information	USA	Canada	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Friends &	50.1	59.6	8.1	64.1	54.0	55.7	50.8	34.4	31.4	49.4	35.3	31.3	38.2	62.4	32.5	32.3	52.4

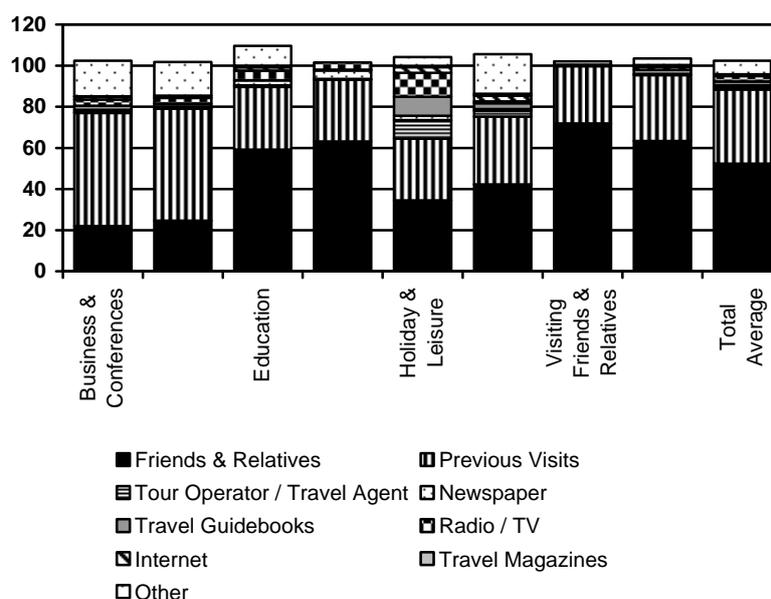
Relatives																		
Previous Visits	28.4	15.4	27.0	31.7	43.4	31.3	23.8	23.0	29.2	24.5	26.0	23.7	38.2	23.5	61.1	34.1	36.1	
Tour Operator / Travel Agent	2.7	0	5.4	0.2	0.1	0.4	1.6	8.2	0.7	4.2	3.7	8.0	5.9	1.2	0.4	5.0	1.2	
Newspaper	2.1	0	0	0.2	1.0	1.7	0	0	1.5	0	3.3	1.6	0	0	0.5	2.1	0.8	
Travel Guidebooks	4.8	0	27.0	0.4	0.1	0.9	6.3	9.8	5.8	5.0	6.0	9.6	3	2.4	0.2	6.3	1.9	
Radio / TV	1.5	3.8	10.8	1.2	1.2	3.0	7.9	3.3	2.2	7.3	9.3	10.8	0	3.5	2.5	6.6	2.6	
Internet	1.8	0	2.7	0.3	0.1	0.9	0	3.3	3.6	2.7	5.1	4.8	0	0	0.4	2.4	0.9	
Travel Magazines	0	0	5.4	0	0	0	0	0	0	0	0.9	1.2	0	0	0	0.5	0.1	
Other	12.2	23.1	18.9	4.8	1.2	9.1	9.5	19.7	29.9	9.2	13.5	17.7	14.7	9.4	5.3	14.6	6.6	
Total	103.6	101.9	105.3	102.9	101.1	103.0	99.9	101.7	104.3	102.3	103.1	108.7	100	102.4	102.9	103.9	102.6	

The survey allowed visitors to select more than one source of information. The primary sources of information on Armenia were friends and relatives and previous visits, with these two sources alone making up over 80% of information gathered by all source markets (on average 52.4% citing friends and family, and 36.1% citing previous visits), and that number increased to over 90% among those travelers with Armenian ancestry.

This data points to a weak representation of Armenia in traditional marketing channels, such as travel magazines, tour operators, and travel guidebooks. Among the source markets, Japan had the highest usage of traditional market channels as a source of information (5.4% citing tour operators, 27% citing travel guidebooks, 10.8% citing radio/TV, and 5.4% citing travel magazines), however, it should be noted that Japan had no significant population of Armenian descent. Greece and Western European countries also had a slightly higher usage of guidebooks, tour operators and radio/TV than other countries. It is interesting to note that “other” sources of information were fairly significant, reaching between 10-20% in several source markets including the US, Canada, Japan, Italy, UK, Germany, other Western Europe, and Lebanon.

The internet was not used as a main source of information about Armenia.

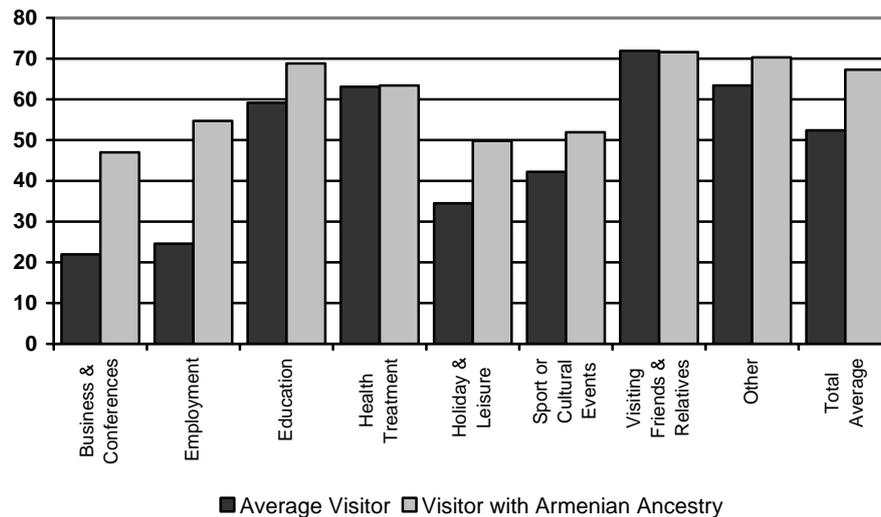
Chart 4: Sources of Information by Purpose of Visit (%)



Business travelers were the least likely to use friends and relatives as a source of information at 22%, while those coming to visit friends and relatives were the most likely to use this resource at 71.9%. Those traveling for employment and holiday/leisure were also less likely to utilize friends and relatives as a resource, at 24.6% and 34.5%, respectively.

Holiday/leisure visitors were the most likely to use tour operators (9.0%), travel guidebooks (9.2%), and radio/TV (11.7%) as sources of information.

Chart 5: Use of Friends and Relatives as a Source of Information (%)



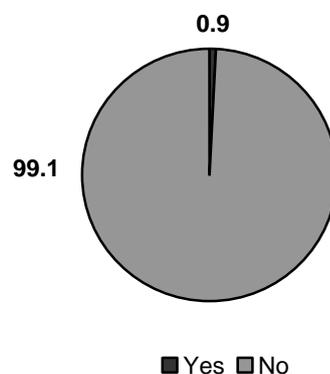
Overall, visitors of Armenian descent were more likely to utilize friends and relatives as a source of information at 67.3%, particularly business and conference tourists (47%) and employment travelers (54.7%), which is a significant departure from the average traveler.

Interviewees were given the opportunity to specify sources of information as part of the survey. Respondents listed several websites, with www.armeniainfo.am, www.google.am, www.google.com, and www.yahoo.com being the most prominent. National Geographic was mentioned most often in terms of travel magazines, while “other” sources of information were primarily organizations or previous knowledge about Armenia as the respondents’ native land.

4.2. TRAVEL BEHAVIOR PATTERNS

4.2.1. Internet Bookings and Travel Arrangements

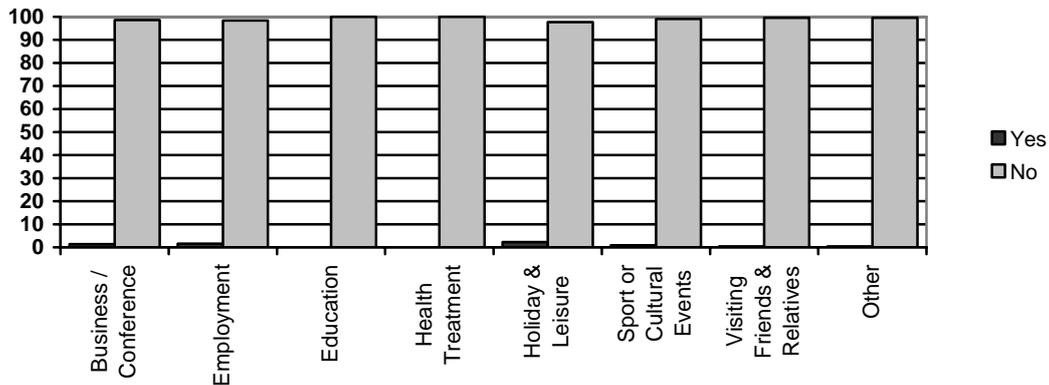
Chart 6: Average Internet Purchases for Travel (%)



The vast majority of visitors to Armenia did not make their travel bookings via the Internet. This was the case across all countries, although the UK had the highest percentage of travelers using the internet for travel bookings, at 8.5%. Italy followed at 6.2%. Tourists from Georgia and Japan did not use the Internet for travel bookings

Armenian ancestry did not have any significant effect on the number travel bookings made via the Internet.

Chart 7: Internet Purchases for Travel by Purpose of Visit (%)



The breakdown by purpose of visit did not show significant differences as to whether bookings were made on the Internet or with another method. Holiday/leisure travelers were the most likely to utilize the Internet at 2.3%, which also supports the hypothesis that one reason for the low incidence of Internet booking was higher utilization of tour operators.

Respondents were also asked to list websites used for hotel and flight bookings. Among the hotels, the Armenia Marriott Hotel in Yerevan was the most prominently mentioned. Europe Hotel was the only other hotel that was listed more than once. The airline booking websites that were listed more than once by respondents were British Airways, Austrian Airways, Czech Airlines, Armavia, Lufthansa, and Travelocity.

Table 9: Travel Arrangements by Market Area (%)

Travel Arrangement	USA	Canada	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Tour Operator	7.2	9.1	10.5	0.1	0	0	1.6	7.7	4.9	9.7	7.7	7.7	0	2.4	0.5	7.9	2.0
Own / Company Arrangement	92.8	90.9	89.5	99.9	100.0	100.0	98.4	92.3	95.1	90.3	92.3	92.3	100.0	97.6	99.5	92.1	98.0

Table 10: Travel Arrangements by Market Area for those with Armenian Ancestry (%)

Travel Arrangement	USA	Canada	Russia	Georgia	Other CIS	Greece	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Tour Operator	6.5	13.2	0	0	0	0	2.8	3.5	1.7	0	0	1.6	1.1	0	0.6
Own / Company Arrangements	93.5	86.8	100.0	100.0	100.0	100.0	97.2	96.5	98.3	100.0	100.0	98.4	98.9	100.0	99.4

While the majority of visitors across all countries utilized their own or their company’s arrangements, there were some differences between source markets. North America, Japan, and Western European countries were much more likely to use tour operators than Russia, CIS countries, or Middle Eastern countries. Japan had the highest usage of tour operators at 10.5%, followed by France (9.7%) and Canada (9.1%). Tourists from Georgia, other CIS countries, and Lebanon did not use tour operators.

Those with Armenian ancestry typically used tour operators even less than the average visitor, except for Iran and Canada, where visitors with Armenian ancestry used tour operators 1.1% and 13.2% of the time, respectively, which demonstrated an increase from the average visitor in those countries.

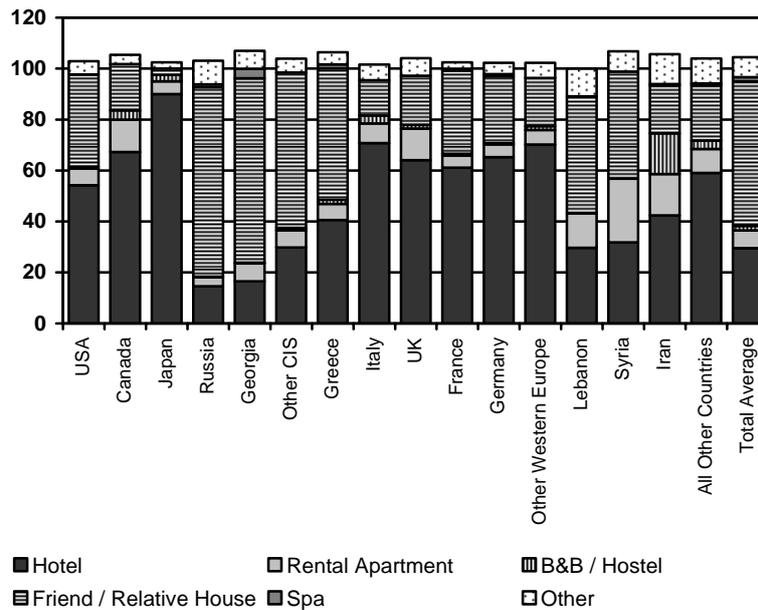
Chart 8: Travel Arrangements Among Holiday and Leisure Visitors (%)



As expected, tour operators were only successful with holiday/leisure tourists. Tourists with any other purpose of travel used their own or their company’s arrangements for 100% of their travel bookings. 16.9% of overall holiday/leisure tourists used tour operators, and this number shrunk to only 8.8% among those with Armenian ancestry. This amounted to only 2% of all tourists to Armenia utilizing tour operators.

4.2.2. Accommodation

Chart 9: Accommodation by Market Area (% of all tourists in each establishment)



A majority of visitors to Armenia (56.7%) found accommodation at a friend or relative's house, when averaged among all source markets, with Russia having the strongest majority (74.4%) followed by Georgia (72.3%). The Japanese were least likely to stay with friends and relatives, at 2.5%, followed by the Italians at 13.8%.

Hotels were the second most preferred type of accommodation at 29.6% when averaged among all source markets, however, several countries showed that a majority within that market area preferred to stay at hotels (rather than with friends and relatives). These include the US (54.2%), Canada (67.3%), Japan (90%), Italy (70.8%), the UK (64.1%), France (61.1%), Germany (65.3%), other Western European countries (70.2%), and Iran (42.4%). Russia and CIS countries were least likely to stay in hotels.

No market area demonstrated a majority of its visitors preferring rental apartments, B&Bs, hostels, or spas over other types of accommodation. Iran had the highest percentage of visitors staying in B&Bs or hostels at 16%, and the second largest percentage of visitors staying at rental apartments at 16.2%, after Syria, which had 25% of tourists staying in rental apartments. Georgians were the most likely to stay at spas, at 3.7%. It is important to remember at this point that Iran and Syria were most likely to travel for employment and education, which explains the high usage of rental accommodation. Also, Georgians were the most likely to travel for health treatment, which accounts for their tendency to stay at spas.

The percentage of those preferring to stay with friends and relatives increased among those with Armenian ancestry, to 79.9%, while the percentage of those staying in hotels, in the same group, decreased to 9.8%. Likelihood to stay with friends and relatives while visiting therefore appeared to correlate with incidence of Armenian heritage.

Table 11: Accommodation by Purpose of Visit (% of all tourists in each establishment)

Accommodation Choice	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
Hotel	68.5	44.2	6.5	4.0	70.9	64.1	3.7	10.9	29.6
Rental Apartment	8.1	22.2	59.4	12.7	10.9	6.8	1.3	5.0	6.9
B&B / Hostel	2.1	19.0	1	0	2.7	1.7	0.1	0	1.8

Friend / Relative House	14.6	9.8	28.3	67.4	17.8	23.9	91.0	72.9	56.7
Spa	0.2	0	0	22.8	4.3	0.9	0.4	0.1	1.6
Other	9.0	12.5	7.2	10.9	7.1	4.3	6.0	12.2	7.9
Total	102.5	107.7	102.4	117.8	113.7	101.7	102.5	101.1	104.5

Logically, those visiting for the purpose of visiting friends and relatives were the most likely to stay with friends or relatives during their trip, at 91%. Those traveling for the purpose of employment, business, or holidays were least likely to stay with friends and relatives at 9.8%, 14.6%, and 17.8% respectively.

Among all categories, those most likely to stay in a hotel were tourists visiting for business (68.5%) or holidays and leisure (70.9%). Employment and education tourists were most likely to stay in rental apartments, most likely due to a longer number of days in country per visit. Those visitors traveling to Armenia for employment were also the most likely to stay in a B&B or hostel, at 12.3%. Understandably, those visiting Armenia for health treatments were the most likely to stay at a spa, at 22.8%.

Travelers with Armenian ancestry were more likely than other visitors to stay with friends or relatives across all categories; however, they also showed an increased preference for rental apartments when visiting for business (+3.9%), health treatments (+1.3%), or holiday/leisure (+4%). They also demonstrated a slightly higher preference for B&Bs and hostels (+2%), and spas (+1%) when visiting for sport or cultural events as well.

Table 12: Accommodation by Purpose of Visit (Average Number of Nights in each Type of Accommodation, per tourist)

Accommodation Choice	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
Hotel	6.3	9.5	7.3	12.5	8.3	9.0	8.7	9.9	7.5
Rental Apartment	18.3	44.3	89.8	42.3	16.0	17.4	26.2	43.5	37.2
B&B / Hostel	6.2	5.5	200	0	6.3	12.5	9.3	0	7.5
Friend / Relative House	12.8	58.1	49.3	21.1	15.6	21.9	24.5	16.8	22.9
Spa	2.3	0	0	15.2	5.7	2.0	7.9	8.0	10.8
Other	10.0	30.5	84.2	12.7	10.1	12.2	39.5	29.5	25.9
Average No. of Nights per Tourist	8.5	22.8	73.7	21.2	10.1	12.7	24.8	18.9	19.3

Understandably, visitors staying in rental apartments averaged the longest stay at 37.2 nights, followed by “other” types of accommodation at 25.9 nights. The shortest stays were among those staying in B&Bs or hostels (7.5 nights on average) and hotels (also 7.5 nights on average).

Tourists visiting Armenia for the purpose of education had, by far, the longest average number of nights in B&Bs and hostels (200 nights), rental apartments (89.8 nights), and “other” types of accommodation (84.2). Those visiting for health treatments had the longest stay at hotels (12.5 nights) and spas (15.2 nights), while tourists visiting for the purpose of employment and education had the longest average stays at friend’s and relative’s houses, at 58.1 and 49.3 nights, respectively.

Holiday/leisure travelers were most likely to spend more nights in rental apartments (16 average nights) or at a friend or relative’s house (15.6 average nights).

There were no notable differences between source markets. The exceptions are tourists coming from “other” Western European countries, which had unusually long average stays in spas at 49 nights, and the Japanese, who had a particularly long average stay of 117 nights when staying in rental apartments.

Visitors of Armenian descent only stayed at each type of accommodation a similar or slightly increased number of nights. The only type of accommodation that showed a significant departure from the average tourist was the “other” category, with an increase of 9.6 nights.

4.2.3. Length of Stay

Chart 10: Length of Stay by Market Area (Mean No. of Nights)

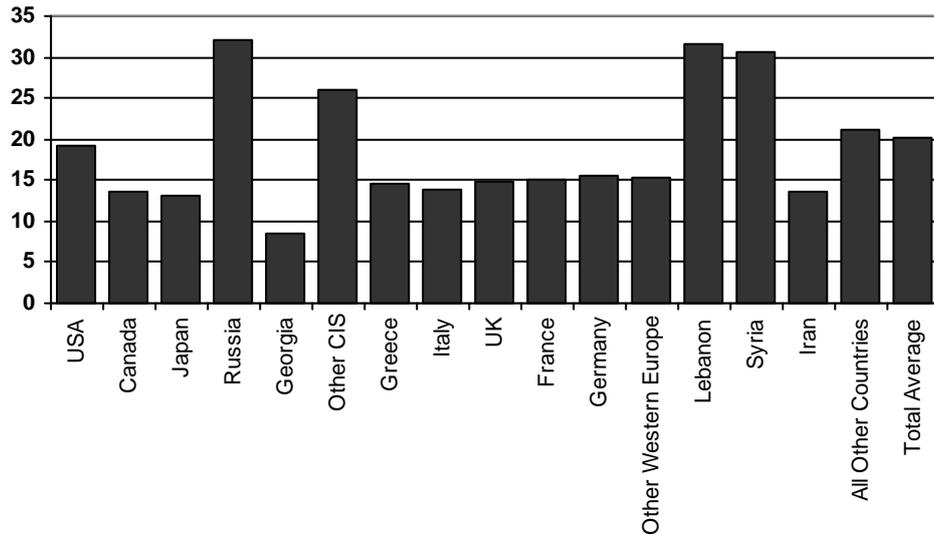
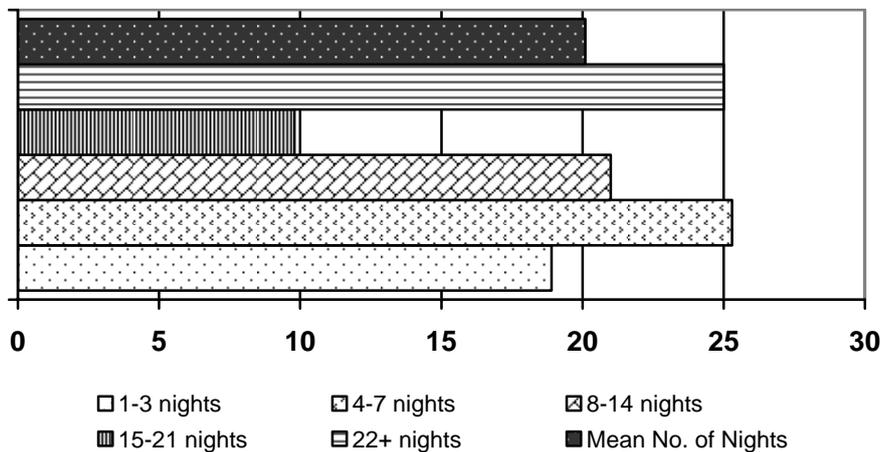


Chart 11: Total Average Length of Stay (nights)



The highest percentage of respondents (25.3%) indicated that they stayed in Armenia for 4-7 nights, while the next largest percentage (25%) came from those staying for 22 nights or more. The least likely length of stay was 15-21 nights, at only 9.8% of respondents. A fairly large percentage of visitors (18.9%) stated that they were visiting Armenia for only 1-3 nights, however, these respondents came primarily from the neighboring countries of Georgia and Iran. Russians were most likely to stay for over 22 nights, at 46.6%.

Accordingly, visitors from Russia had the longest mean stay in Armenia at 32 nights, followed by Lebanon at 31.7 nights and Syria at 30.6 nights, while the visitors with the shortest mean

stay were those from Georgia (8.6 nights) and Iran (13.6 nights). Visitors from Western European countries, Japan, and Canada averaged between 13-15.5 nights in Armenia, while visitors from the US had a slightly higher mean number of nights in country at 19.1.

As expected, travelers with Armenian ancestry were more likely to stay in the country for longer periods of time, with a majority of these respondents (35.3%) visiting for 22 nights or more. The mean number of nights spent in Armenia also increased across all source markets for those of Armenian descent.

Table 13: Length of Stay in Armenia by Purpose of Visit (%)

Length of Stay	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
1-3 nights	37.3	37.9	3.6	9.1	6.8	16.2	12.2	19.6	19.0
4-7 nights	34.3	24.9	5.8	17.8	40.3	26.5	18.1	26.2	25.3
8-14 nights	17.3	11.4	8.7	22.1	36.5	33.3	19.7	21.6	21.0
15-21 nights	5.3	7.6	6.5	17.0	8.0	11.1	11.8	11.8	9.8
22+ nights	5.7	18.2	75.4	34.1	8.4	12.8	38.2	20.8	25.0
Mean No. of Nights	8.7	24.6	75.3	24.9	11.5	12.9	25.4	19.1	20.1

Visitors traveling to Armenia with the purpose of education or visiting friends and relatives had the longest mean number of nights, at 75.3 and 25.4,5 respectively, and were most likely to stay for 22+ nights, with 75.4% of education visitors and 38.2 % of friends and relatives visitors selecting this category.

However, the majority of business and employment tourists stayed for only 1-3 nights, with 37.3% of business tourists and 37.9% of employment tourists selecting this answer. Business tourists also had the shortest mean number of nights in Armenia among all categories, with 8.7 nights. Holiday/leisure and sport and cultural event tourists also had a relatively low mean number of nights spent in Armenia, at 11.5 and 12.9, respectively.

The only significant difference among tourists with Armenian heritage was that those visiting for the purpose of education had a higher mean number of nights than the average tourist, at 67.9, and a higher percentage of visitors staying over 22 nights, at 78.7%.

4.2.4. Places Visited

Chart 12: Places Visited by Market Area (%)

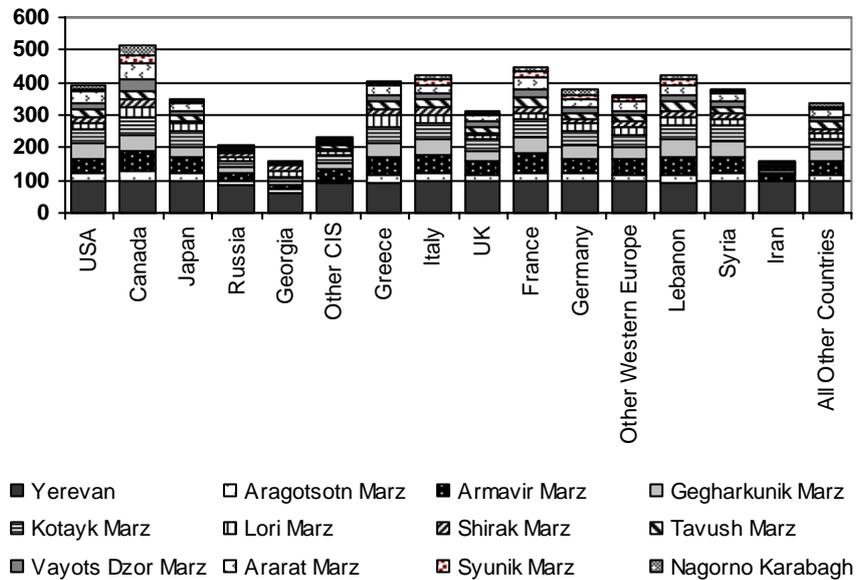
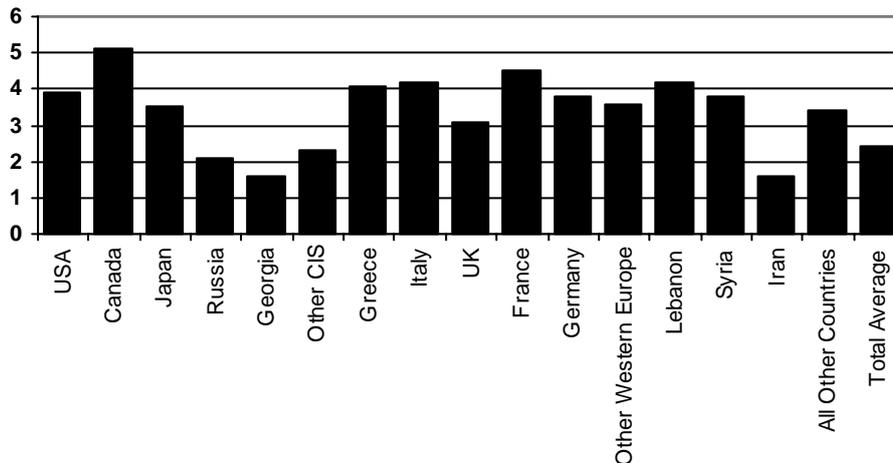


Chart 13: Average Number of Places Visited by Market Area

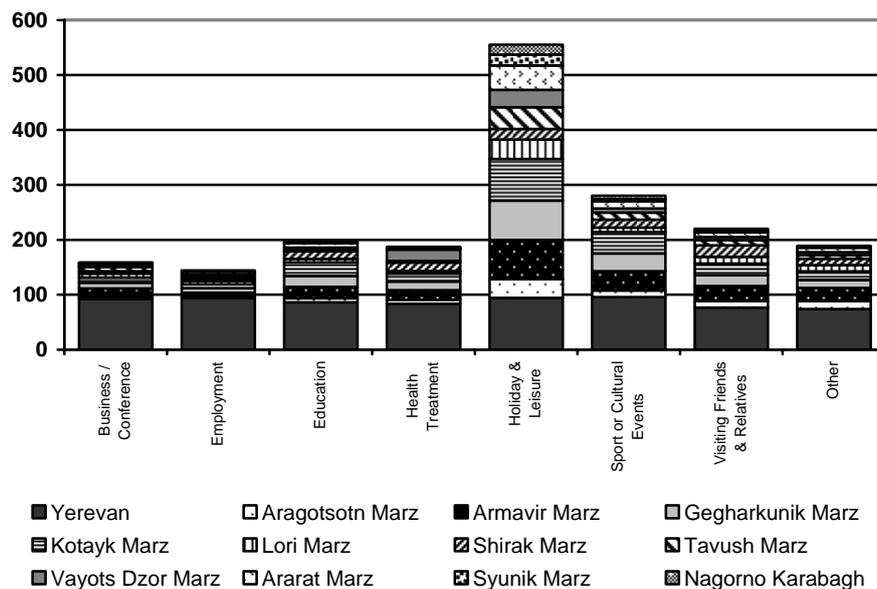


Yerevan was by far the most visited location in Armenia, with 83.5% of respondents (interviewees gave more than one answer) spending at least some time there. Armavir Marz and Kotayk Marz attracted a significant proportion of visitors as well, with 28.3% and 23.7%, respectively. Syunik Marz and the Republic of Nagorno Karabakh attracted the smallest percentages of tourists, at 4.7% and 4.3%. The trend demonstrates that locations closer to Yerevan experience more tourist traffic, while the regions that are farthest away from Yerevan have the most difficulty attracting visitors.

Russians and Georgians were least likely to spend time in Yerevan, with only 86.3% and 61.3% of tourists spending time there. This differed from other source markets, all of which had 90% or more of tourists visiting Yerevan. North Americans and Western Europeans were most likely to travel to more distant locations.

Overall, the average number of locations visited was only 2.4, with Canadians visiting the most locations per visit with 5.1, and Georgians and Iranians visiting the least number of locations with 1.6 each.

Chart 14: Places Visited by Purpose of Visit (%)



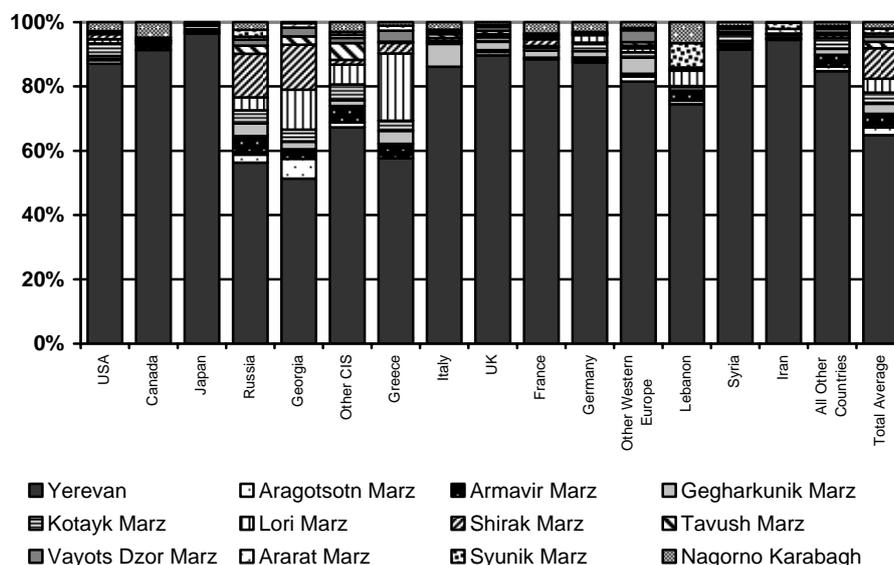
Logically, visitors traveling to Armenia for employment visited the least average number (1.4) of different locations, while those traveling for holiday/leisure visited the most (5.6). Business and health treatment tourists were also not likely to visit multiple locations, both averaging less than 2 different places visited.

Those visiting friends and relatives or traveling for “other” reasons were most likely to spend time outside of Yerevan, with only 76.5% and 74.1% spending time in the city, compared to over 80% for education and health treatment travelers, and over 90% for all other travelers. Holiday/leisure travelers had the highest percentage of respondents visiting all other locations outside of Yerevan.

There were not notable differences between the average visitor and those with Armenian heritage in terms of places visited.

4.2.5. Distribution of Tourist Nights

Chart 15: Distribution of Tourist Nights by Market Area (%)



Yerevan had the highest percentage of tourist nights, at 64.9%, followed by Shirak Marz, at 9.5%. All other locations had 2-5% each of the tourist night distribution, but Ararat, Syunik and Vayots Dzor Marzes had the lowest percentage of all tourist nights, at 0.9%, 1.5% and 1.7% correspondingly.

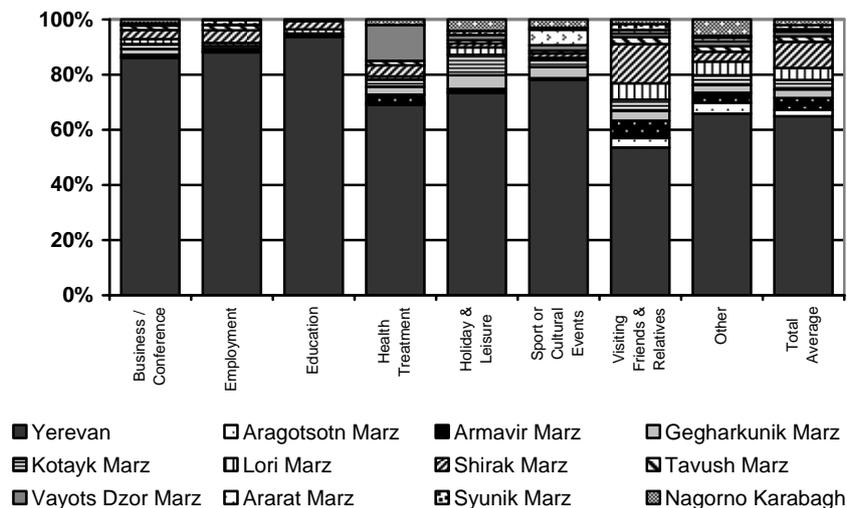
Georgians and Russians had the lowest percentage of tourist nights spent in Yerevan, at 51.3% and 56.3%, respectively, while the Japanese and the Iranians had the highest percentage of nights spent in Yerevan, at 96.6% and 94.4%.

The Georgians and Russians were also significantly more likely to spend a night in Shirak Marz than any other group, with this location comprising 14% and 13.6% of their time, respectively. All other source markets had less than 3.5% distribution to this region.

Greeks and Georgians were also particularly likely to visit Lori Marz (more than a 5% increase over other source markets), Lebanese were more likely to visit Syunik Marz (more than a 5% increase over other source markets) and Nagorno Karabagh (Lebanese had the highest distribution in this region), and Italians were most likely to visit Lake Sevan (7.1%).

Visitors with Armenian ancestry spent slightly less time in Yerevan (59.6%) and slightly more, or the same, time in other regions.

Chart 16: Distribution of Tourist Nights by Purpose of Visit (%)



Visitors traveling to Armenia for education had the highest distribution of tourist nights in Yerevan, at 93.7%, while those visiting friends and relatives had the lowest time spent in Yerevan, at only 53.6%.

Those visiting friends and relatives were the most likely to stay in several other areas, with a particularly high distribution of nights in Shirak Marz at 14.3%, Lori Marz at 5.9% and Armavir Marz at 6.3%. It seems reasonable, given other results of the survey, that one of the reasons for higher percentages in these locations, particularly Shirak Marz, would be that Georgians and Russians had high numbers of friends and relatives in this region.

Health treatment tourists had a significantly higher percentage than other purposes of travel staying in Vayots Dzor Marz, comprising 13.1% of their nights. Holiday/leisure tourists spent a higher percentage of their nights in Kotayk Marz (7.4%), while sport and cultural event tourists spent a higher percentage of their nights in Ararat Marz (5.6%).

4.3. VISITOR RATINGS

4.3.1. Rating of Facilities & Services

Table 14: Rating of Facilities & Services (%)

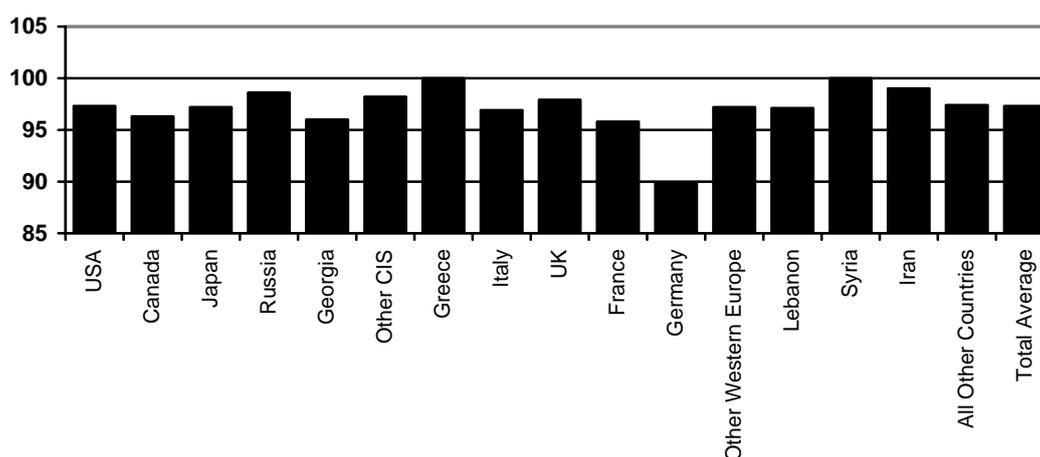
Facilities & Services	Excellent (5)	Good (4)	Satisfactory (3)	Poor (2)	Very Poor (1)	Average Rating
Hotels	38.2	52.2	7.7	1.4	0.4	4.3
Restaurants	45.8	43.4	9.4	1.1	0.3	4.3
Spas	53.9	33.6	8.8	2.9	0.7	4.4
Tour Operators	41.5	47.7	9.7	0.7	0.4	4.3
General Value for Money	9.3	38.5	30.8	13.3	8.0	3.3
International Transportation	29.6	50.6	16.3	2.7	0.8	4.1
Local Roads	7.1	36.5	26.8	17.2	12.4	3.1
Attractions	66.9	27.7	4.6	0.5	0.3	4.6
Guide Services	47.5	36.0	11.2	2.3	3.0	4.2
Efficiency of Border Services	22.9	48.7	19.9	6.0	2.5	3.8

Interviewees were asked to rate various services and facilities on a scale of 1-5, where 5 represented excellent facilities/services, and 1 represented very poor facilities/services. Armenia rated lowest on local roads, with an average rating of 3.1, and general value for money, with an average rating of 3.3. Armenia rated highest on the attractions, with an average rating of 4.6 and the spas with an average rating of 4.4.

Holiday/leisure tourists gave the highest average rating, of 4.1, while education visitors gave the lowest rating of 3.6.

4.3.2. Interest in Visiting Armenia Again

Chart 17: Interest in Visiting Armenia Again by Market Area (%)



The vast majority of tourists to Armenia (97.3%) intended to, or had interest in, returning. This percentage increased to 98.8% among those of Armenian descent. Germans were the least interested in returning to Armenia, with 10.1% of Germans replying that they did not intend to return, followed by the French at 4.2%. Greeks and Syrians were most likely to return, with 100% of respondents interested in a return trip.

Chart 18: Interest in Visiting Armenia Again by Purpose of Visit (%)

Tourists visiting for “other” reasons were least likely to recommend Armenia to friends and relatives, with 4% answering no, while education tourists were most likely to recommend Armenia, with only 1.6% responding negatively (despite their low ratings on services).

The only significant difference among those with Armenian heritage was employment visitors, of which 7.3% would not recommend Armenia as a holiday destination - a 3.9% increase over the average employment visitor answering no to this question.

4.4. VISITOR EXPENDITURE¹

4.4.1. Average Expenditure per Person & Daily Receipts

Table 17: Average per Head and Daily Receipts in Armenia by Travel Arrangement & Market Area (USD)

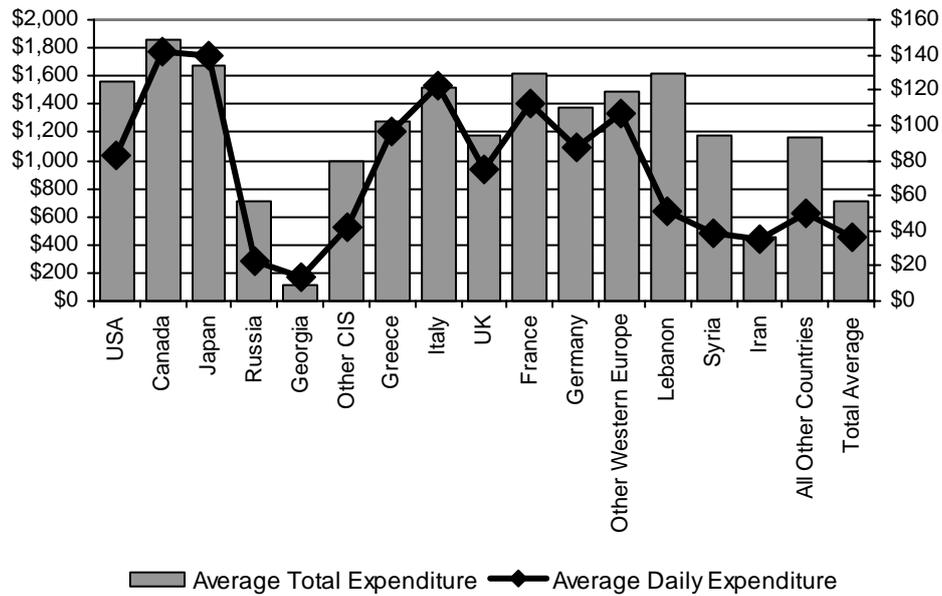
Expenditure	USA	Canada	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
ALL																	
Average Total Expenditure	1567.0	1860.8	1669.7	715.2	112.6	991.7	1283.1	1524.4	1180.2	1619.4	1377.9	1490.4	1611.5	1175.0	460.0	1160.4	705.4
Average Length of Stay	18.9	13.1	12.0	31.4	8.1	23.6	13.3	12.4	15.8	14.4	15.8	14.0	31.6	30.2	12.9	23.2	19.6
Average Daily Expenditure	82.7	142.1	139.5	22.8	13.9	41.9	96.4	122.7	74.6	112.1	87.1	106.6	51.0	38.9	35.6	49.9	36.0
PACKAGE TOURS																	
Average Total Expenditure	3025.7	2651.1	2700.0	1717.6	0.0	0.0	1800.0	1847.3	2250.0	2474.5	2273.8	2630.3	0.0	930.0	646.9	2181.2	2350.9
Average Length of Stay	11.4	12.2	7.5	7.3	0.0	0.0	9.0	10.8	8.7	11.5	10.4	10.3	0.0	7.0	8.7	10.3	10.5
Average Daily Expenditure	266.3	217.3	360.0	234.2	0.0	0.0	200.0	171.0	258.2	215.5	218.4	255.4	0.0	132.9	74.6	211.1	224.3
OWN ARRANGEMENT																	
Average Total Expenditure	1454.2	1747.9	1485.7	713.6	112.6	991.7	1276.6	1491.1	1083.7	1531.6	1295.4	1379.3	1611.5	1183.6	458.0	1034.5	667.5
Average Length of Stay	19.6	13.2	12.7	31.4	8.1	23.6	13.4	12.6	16.2	14.8	16.3	14.3	31.6	30.8	12.9	24.5	19.8
Average Daily Expenditure	74.2	132.5	117.4	22.7	13.9	41.9	95.3	118.6	66.8	103.6	79.3	96.4	51.0	38.4	35.4	42.1	33.7

¹ The following approach was applied for the calculation of expenses made by RA non-resident visitors in the economic area of Armenia. The tour package cost was reduced (line 17 in the questionnaire) by 20%, taking into account typical tour operator commissions in source markets.

If the package also covered international transportation expenses and those services were provided by a foreign carrier, then the package cost was reduced by a further 35% on average and divided by the number of people. If the package cost didn't cover the international transportation costs and transport was provided by Armavia then the applicable transport costs was added (line 17.3) and the amount divided by the applicable number of people.

The expenses of individual travelers were calculated using the following approach: International travel expenses were deducted from the total amount of expenses if the services of a foreign air carrier were used and the amount was divided by the number of people (line 19.2).

Chart 19: Average Per Head and Daily Receipts Among All Visitors (USD)

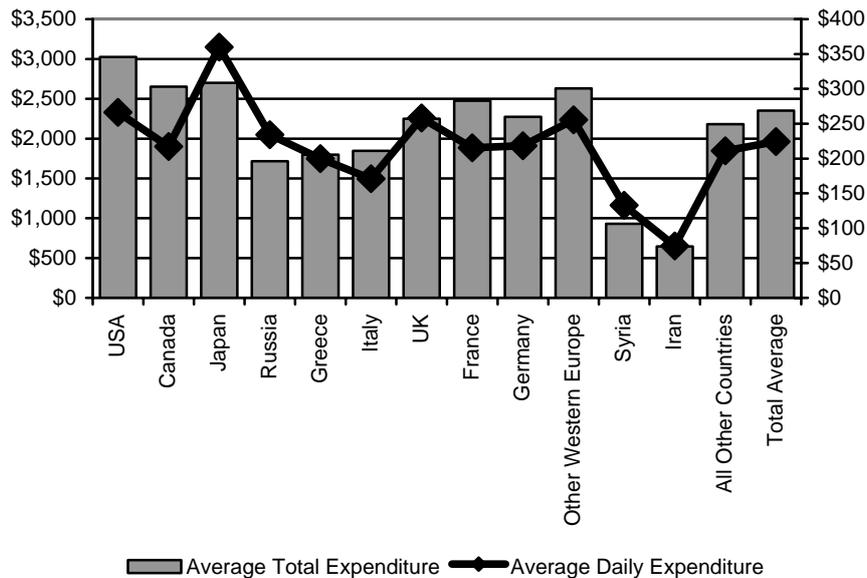


The total average expenditure per head among all tourists was \$705.40, with an average length of stay of 19.6 days and an average daily expenditure of \$36.00.

While those visiting Armenian through package tours constituted a small proportion of tourists, they spent significantly more per trip, spending an average \$224.30 per day for only an average of 10.5 days, totaling \$2,350.90. Visitors traveling via their own arrangements spent only an average of \$667.50 during their entire stay of 19.8 days, averaging \$33.70 per day.

Canadians spent the most during their stay to Armenia at \$1,860.80 per visit of only 13.1 days, which averaged to \$142.10 per day. The Japanese followed, spending \$1,669.70 per trip of 12 days, averaging \$139.50 in daily receipts. The Georgians were by far the lowest spenders, \$112.6 per 8.1 day trip, averaging only \$13.90 in daily receipts. Iranians were also less likely to spend while in Armenia, averaging \$460.00 per trip with 12.9 days of \$35.60 daily receipts.

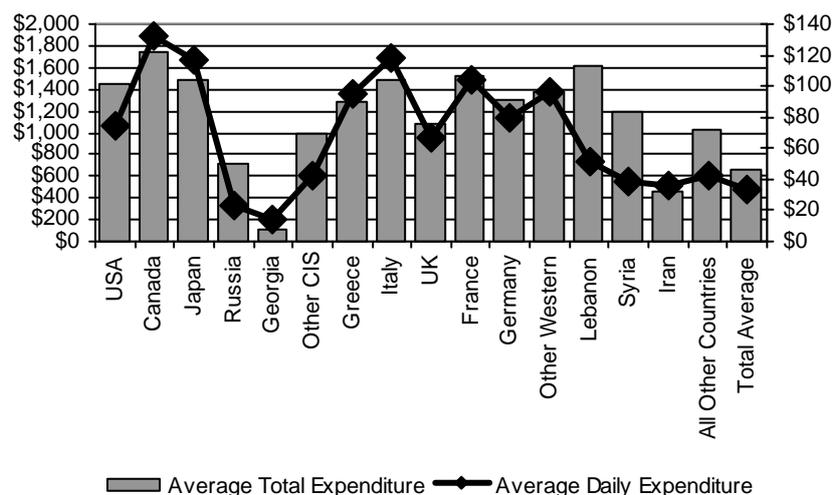
Chart 20: Average Per Head and Daily Receipts by Market Area – Package Tours (USD)



In terms of the package tours, Americans spent the most during their visit, at \$3,025.70, followed by the Japanese at \$2,700 per trip, however, the Japanese were higher spenders on a daily basis, spending \$360 per day, followed by visitors from the US with \$266.30 in daily receipts. It is important to note that Japanese tourists averaged shorter tours of only 7.5 days, whereas American tourists visiting through package tours stayed about 4 days longer, which implies that if the Japanese stayed for longer periods of time, they would be the highest spenders overall when traveling with package tours.

Some countries, including Georgia, other CIS countries, and Lebanon did not have any tourists registering for package tours. The lowest spender of those countries that did travel via package tours was Iran, spending \$646.90 with average daily receipts of \$74.60 for 8.7 days.

Chart 21: Average Per Head and Daily Receipts Among Visitors with Own Arrangements (USD)

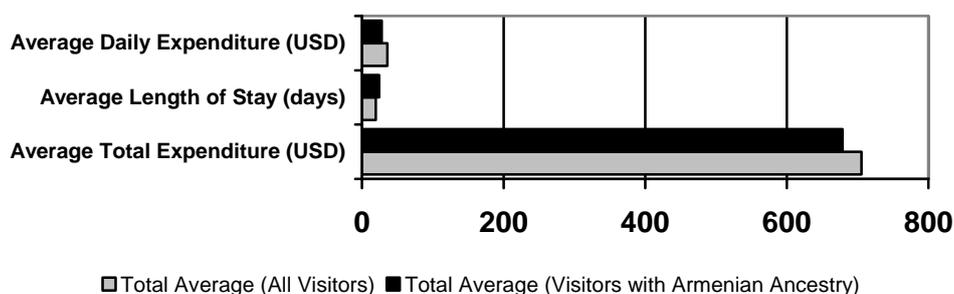


Canadians were the highest spenders among visitors making their own travel arrangements, both in terms of overall expenditure (\$1,747.90) and daily receipts (\$132.50), followed by Lebanon, with a total expenditure of \$1,611.50. However, Lebanon's daily receipts were in the lower range of \$51 per day, so the total expenditure figure is skewed by the fact that

Lebanese visitors stay for an average of 31.6 days, while Canadians, Japanese, and Italians (who had the next highest amounts of daily receipts) spent only around 13 days in country.

Georgians were again the lowest spenders, in both total expenditure (\$112.6) and daily receipts (\$13.90). These figures were the same as among all visitors because they did not participate in any package tours. Iranians were the next lowest spenders among those making their own arrangements, spending only \$458 per trip, however, their daily receipts (\$35.40) were slightly higher than the Russians, who spent only \$22.70 per day.

Chart 22: Comparison of Daily Receipts and Expenditure for Visitors with Armenian Ancestry



Visitors with Armenian ancestry spent less in terms of overall expenditure (\$678.70 per trip) as well as on daily receipts (\$27.90 per day) than the average tourist. Their likelihood to spend while in country was also exacerbated by their longer stays in country, (on average those with Armenian heritage spent 5 days more in Armenia) so if put in line with the average tourist, their total expenditure would actually have been even lower. This is likely due to the fact that visitors with Armenian ancestry were more likely to stay with friends and relatives while in country, thereby spending less on accommodation and restaurants.

Table 18: Average per Head and Daily Expenditure by Travel Arrangement & Purpose of Visit (USD)

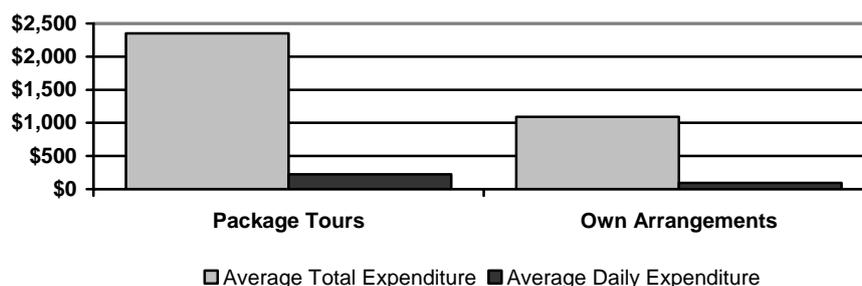
Expenditure	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
ALL									
Average Total Expenditure	645.2	618.0	1181.7	717.5	1294.8	1158.6	582.3	664.4	724.1
Average Length of Stay	9.0	18.0	73.0	25.4	11.5	14.5	24.9	17.5	19.6
Average Daily Expenditure	71.8	34.3	16.2	28.3	112.2	79.8	23.4	38.1	36.9

Holidaymakers were the highest spenders, averaging \$1,294.80 per trip and \$112.20 in daily receipts, followed by sport and cultural event tourists, averaging \$1,158.60 per trip and \$79.80 in daily receipts.

Education tourists had the next highest total expenditure per trip, at \$1,181.70, however, they were the lowest spenders in terms of daily receipts, at only \$16.20 per day. This was due to their very long stays (73 days) in country, and it is also important to remember that these visitors were younger and likely to have less, if any, regular income.

Business tourists spent a decent \$71.80 per day while in Armenia, while tourists visiting friends and relatives had low daily receipts around \$23.40 per day and the lowest spending per trip at only \$582.30.

Chart 23: Comparison of Expenditures Among Holiday Makers (USD)



Visitors traveling for holiday/leisure were the only group in which a breakdown between package and own travel arrangements apply, but there were significant differences. Those traveling with a tour package spent \$2,350.90 per trip, an increase of \$1,260.10 over those holiday makers arranging their own travel. This applied to daily receipts as well, with tour package holidaymakers spending \$224.30 per day versus \$92.70 per day among those making their own arrangements.

Among those with Armenian heritage, expenditures were lower. While visitors participating in sport or cultural events had the highest total expenditure per trip (\$1,337.20), the average daily expenditure for this category was still lower than that of the average tourist. The breakdown among the other categories was similar.

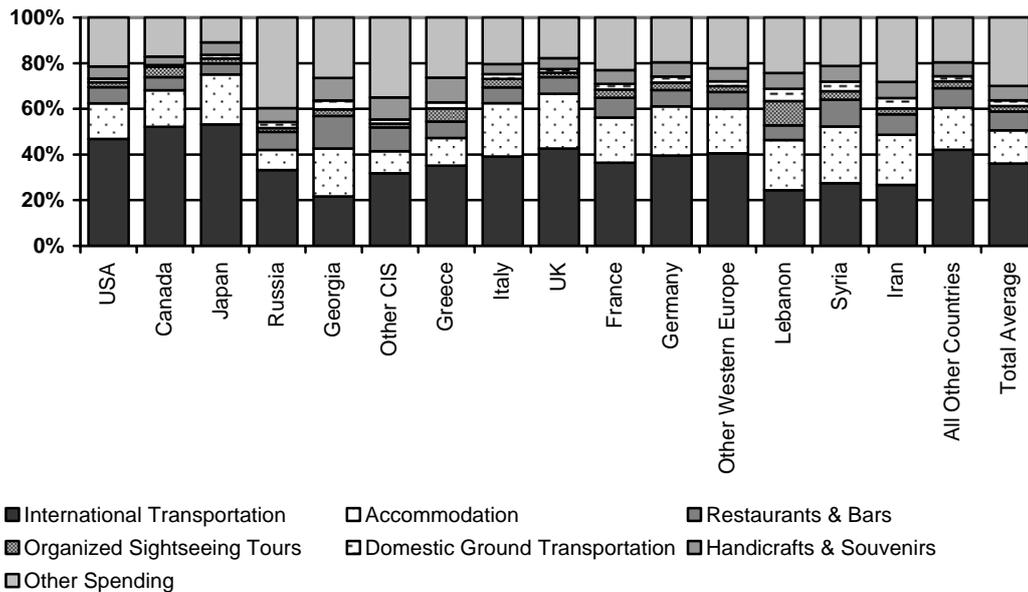
4.4.2. Average Itemized Expenditure for Tourists on Own Travel Arrangements²

Table 19: Average Itemized Expenditure for Tourists on Own Travel Arrangements by Market Area (%)

Expenditure Item	USA	Canada	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
International Transport	46.8	52.1	53.1	33.2	21.6	31.8	35.2	39.2	42.6	36.4	39.5	40.6	24.4	27.5	26.7	42.1	36.1
Accommodation	15.5	16.0	21.9	8.8	21.0	9.6	12.1	23.3	23.9	19.8	21.5	19.5	22.0	24.8	21.9	18.3	14.5
Restaurants & Bars	7.1	5.8	4.8	7.9	14.2	10.4	7.2	6.9	7.3	8.6	7.1	7.3	6.4	11.7	8.9	8.6	8.2
Organized Tours	2.1	4.5	2.2	1.7	2.9	1.7	5.7	3.8	2.0	3.6	3.3	2.6	10.6	3.7	2.6	3.0	2.4
Domestic Ground Transport	1.7	0.8	1.6	2.6	3.9	1.8	2.7	2.1	1.6	2.5	2.7	2.1	5.4	4.2	4.5	2.3	2.5
Handicrafts & Souvenirs	5.3	3.7	5.4	6.1	9.9	9.6	10.9	4.4	4.7	6.1	6.2	5.8	7.0	6.9	7.1	6.1	6.3
Other Spending	21.4	17.1	10.9	39.7	26.4	35.0	26.3	20.4	17.8	23.0	19.6	22.2	24.3	21.2	28.2	19.6	30.0
Average Total Expenditure (USD)	2511.6	2640.2	2361	1175.0	124.4	1235.6	1245.1	2205.3	1746.2	1896.8	1718.4	1286.3	1531.0	1254.8	668.4	1862.6	985.8

Chart 24: Average Itemized Expenditure for Tourists on Own Travel Arrangements by Market Area (%)

² Unlike the data in the previous section, no reduction of expenses was made for the data in this section.



In this section, it is important to note for the sake of clarity that the percentages listed are proportions of spending, rather than absolute amounts. Therefore, although the proportions may be higher for some market segments, the actual expenditure may be less than other segments.

Among all visitors, an average of 36.1% of spending was expended on international transportation. Logically, those source markets that are located further from Armenia (Japan – 53.1%, Canada – 52.1%, and the US – 46.8%) spent the most on international transport while countries in closer proximity spent less in this category (Georgia – 21.6%, Lebanon – 24.4%, Iran – 26.7%).

The next largest expenditure was in the “other spending” category, with Russians spending more on other spending than any other single category at 39.7%, followed by other CIS countries at 35%.

Accommodation expenditures averaged at 14.1% among all source markets, however Syrians spent the most on this category, with 24.8%. This is most probably due to the fact that Syrians made up the largest percentage of students in Armenia, and their long visits mean they spend more of their budget on accommodation. Tourists from Middle Eastern countries, Western European countries, Japan, and Georgia spent over 19% on accommodation, while tourists from Russia and other CIS countries spent the least, at 8.8% and 9.6%, respectively. North American tourists spent about 16% of their funds on accommodation.

Restaurants and bars comprised a large amount of spending for those from Georgia (14.2%), Syria (11.7%), and other CIS countries (10.4%). Japanese tourists spent the least amount on restaurants, at 4.8%. The percentage spent on restaurants generally appears to correlate with the average amount of time each market area spends in country; the longer the stay, the lower the percentage of expenditure spent on bars and restaurants

Lebanese tourists were, by far, the most likely to spend on organized sightseeing tours, with 10.1% of their funds going into this category. They were followed by the Greeks at 5.7% and the Canadians at 4.5%. Tourists from Russia and other CIS countries had the lowest expenditure on organized tours, tied at 1.7% of funds. It is interesting that Americans, the British, and the Japanese also had a low percentage of expenditure in these areas, at 2.1%, 2.0%, and 2.2% respectively, possibly due to their increased use of package tours.

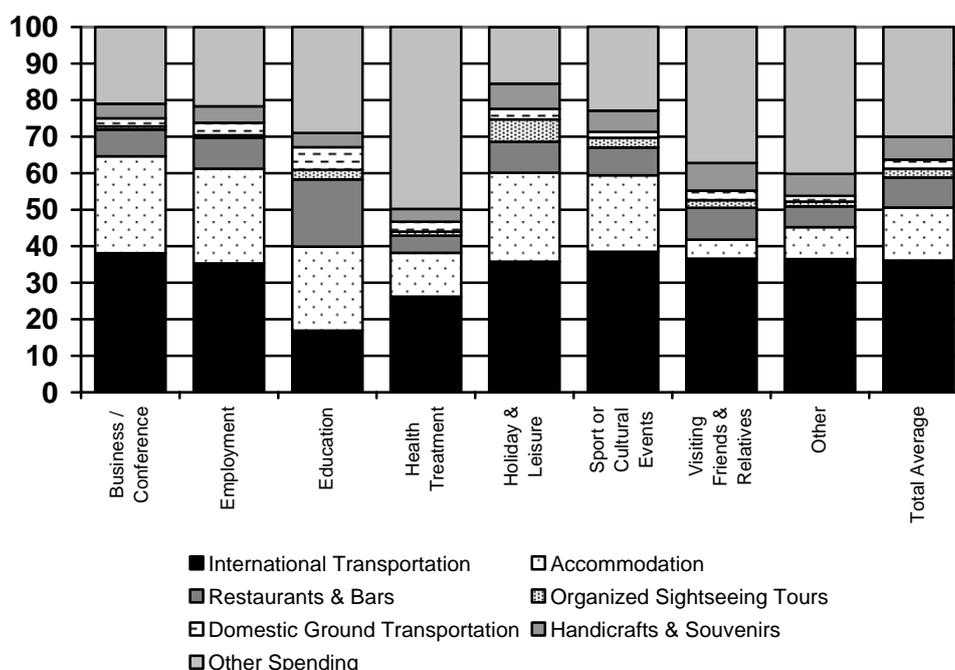
The Lebanese, Syrians, and Iranians spent the largest percentages on domestic ground transportation, while Canada, Japan, and the UK were apparently less keen on spending on this type of transportation.

Greeks, Georgians, and other CIS spent the most, proportionately, on souvenirs, while Canadians, Italians, and the British spent the least.

Table 20: Average Itemized Expenditure for Tourists on Own Travel Arrangements by Purpose of Visit (%)

Expenditure	Business /Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
International Transportation	38.1	35.3	16.9	26.2	35.8	38.5	36.6	36.5	36.1
Accommodation	26.5	25.9	23.0	12.0	24.3	20.9	5.2	8.7	14.5
Restaurants & Bars	7.3	8.5	18.4	4.7	8.5	7.6	8.7	5.7	8.2
Organized Sightseeing Tours	0.9	0.7	2.6	1.1	6.1	2.7	2.1	1.3	2.4
Domestic Ground Transportation	2.2	3.4	6.2	2.7	2.9	1.6	2.6	1.6	2.5
Handicrafts & Souvenirs	4.0	4.5	3.9	3.5	6.9	5.8	7.6	6.0	6.3
Other Spending	21.0	21.6	29.0	49.8	15.4	23.0	37.2	40.3	30.0

Chart 25: Average Itemized Expenditure for Tourists on Own Travel Arrangements by Purpose of Visit (%)



The groups that spent the largest percentage of their funds on international transportation were holiday/leisure (35.8%), sport and cultural event (38.5%), business (38.1%), and “other” (36.5%) tourists.

Those visiting for education spent the least on international transportation, allocating only 16.9% , however, this group spent significantly more on restaurants and bars and domestic ground transport than other groups, with 18.4% and 6.2%, respectively, of their budget going into these categories. Again it is important to remember that education tourists came primarily from countries that are physically closer to Armenia, and spent much longer amounts of time in the country, which accounts for these differences.

The holiday/leisure, business, and employment tourists spent the most on accommodation, at 24.3%, 26.5%, and 25.9%, respectively, while those visiting friends and relatives spent the least in this category, at 5.2%.

As one may expect, holidaymakers also spent the most on organized tours (6.1%), but were surpassed in terms of spending on souvenirs (6.9%) by those visiting friends and relatives, who spent 7.6% in this category.

Among those with Armenian ancestry, the largest difference was that there was about a 6% cut in the amount spent on accommodation, which is to be expected since many tourists with Armenian ancestry stayed with friends and relatives.

5. ARRIVAL SURVEY RESULTS

5.1. VISITOR PROFILE

5.1.1. Country of Citizenship

Table 21: Country of Citizenship

Country	Percentage of Total Surveyed
Armenia	97.0
Czech Republic	0.1
France	0.1
Georgia	0.3
Germany	0.1
Iran	0.3
Russian Federation	1.5
Syrian Arab Republic	0.1
Ukraine	0.1
United Kingdom	0.1
United States	0.1

The Arrival Survey was conducted to examine the international travel behavior of Armenian residents. It is therefore not surprising that 97% of all Armenian residents had Armenian citizenship. Russians were the next largest group, with 1.5%. Countries with 0.1% or more included the Czech Republic, France, Georgia, Germany, Iran, Syria, Ukraine, the UK, and the US. Other countries were represented but comprised less than 0.1% of the interviewees.

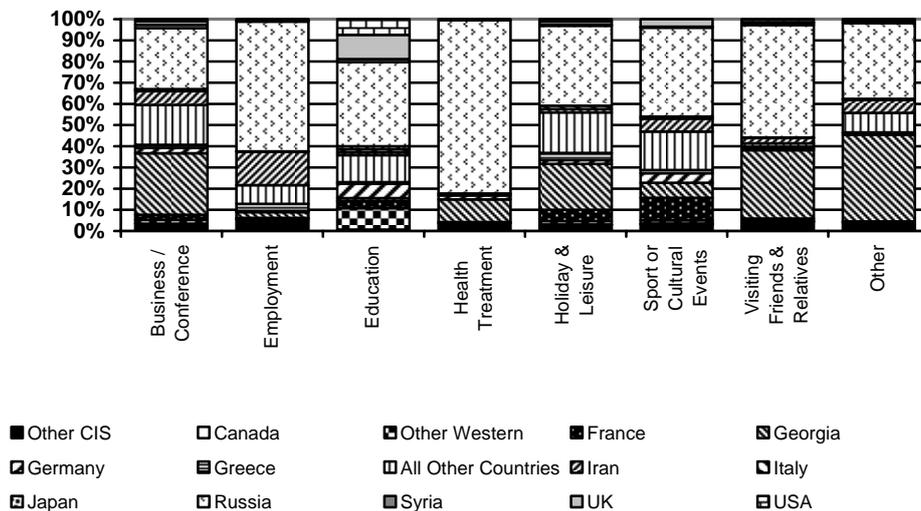
5.1.1. Country Visited

Table 22: Main Country Visited Overseas³

Country	Percentage of Total Survey
USA	1.0
Canada	0.1
Argentina	0.0
Japan	0.1
Russia	44.9
Georgia	24.7
Other CIS	4.0
Greece	1.6
Italy	0.5
UK	1.1
France	1.9
Germany	1.5
Other Western Europe	1.2
Lebanon	0.0
Syria	1.0
Iran	5.9
All Other Countries	10.4

Russia and Georgia comprised the main (44.9% and 24.7% respectively) destinations for Armenians travelling overseas. Iran and other CIS countries also had fairly significant numbers of visitors, comprising 5.9% and 4%, respectively. All other countries were below 2%.

Chart 26: Country Visited by Purpose of Visit (%)



When broken down by purpose of visit, those visiting Russia had the lead in every category, ranging from a majority percentage of 28% to 82%, except for the “other” category, in which visitors to Georgia had the largest percentage at 41%. Travelers visiting Georgia also held

³ Shaded countries are those for which the absolute number of tourists is limited and therefore perhaps not representative

second place in every other category except employment, where those visiting Iran were the largest percentage after Russia, at 15.8%, and education and cultural events, in which those visiting “all other countries” comprised the next largest percentage.

Additionally, Armenian residents were most likely to have traveled to the US, the UK, Germany, and “other” Western European countries for education purposes. France was most popular among those traveling for sport and cultural events or holiday/leisure.

5.1.3. Age & Gender

Table 23: Age & Gender by Purpose of Visit (%)

Gender & Age	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
Men	67.0	85.2	45.3	50.5	52.0	60.3	40.2	50.4	57.2
Women	33.0	14.8	54.7	49.5	48.0	39.7	59.8	49.6	42.8
Total	100	100	100	100	100	100	100	100	100
17 or Younger	0.2	0	5.4	2.3	3.1	8.5	3.1	0.9	1.8
18 – 35	28.4	26.4	80.4	19.6	54.3	52.8	29.6	25.6	32.5
36 – 55	65.0	68.9	14.2	47.7	38.2	34.7	46.1	59.2	54.0
56 and Over	6.3	4.5	0	30.4	4.4	4.0	21.2	14.3	11.6
Total	100	100	100	100	100	100	100	100	100
Average Age	40.5	40.6	28.1	45.1	34.4	33.0	41.6	42.0	40.0

Chart 27: Gender Balance (%)

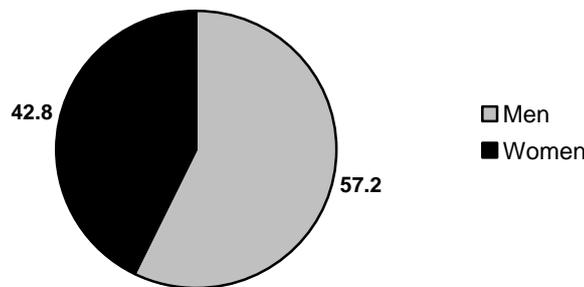
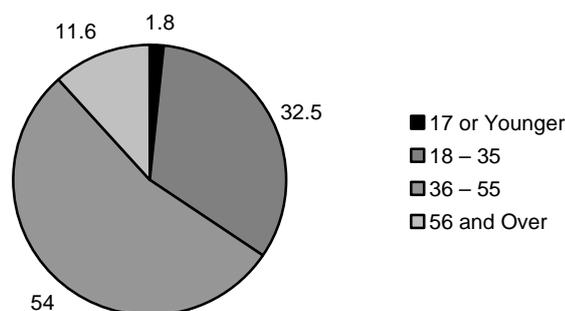


Chart 28: Average Age (%)



Overall, men comprised the majority of Armenian travelers at 57.2%, with the highest gender gap among employment travelers, with men constituting 85.2%. Women comprised a majority only among those visiting friends and relatives (59.8%) and education (54.7%).

The majority of travelers also fell between the ages of 36-55, at 54%. This age group held a particularly high majority among business (65%) and employment (68.9%) travelers, as well as visitors for “other” purposes (59.2%). Those between the ages of 18-35 held the majority among education visitors (80.4%) as well as in the categories of holiday/leisure (54.3%) and sport and cultural events (52.8%). Understandably, visitors aged 55 and over had the highest percentage of health treatment travelers (30.4%).

5.2. TRAVEL BEHAVIOR PATTERNS

5.2.1. Travel Arrangements

Table 24: Travel Arrangements by Country Visited (%)

Travel Arrangement	USA	Canada	Argentina	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Tour Operator	2.0	0	0	0	0.7	1	1.8	15.5	18.4	4.6	7.4	2.6	5.9	0	1.1	0.7	11.5	2.5
Own / Company Arrangements	98.0	100.0	100.0	100.0	99.3	99.2	98.2	84.5	81.6	95.4	92.6	97.4	94.1	100.0	98.9	99.3	88.5	97.5

The vast majority (97.5%) of respondents did not utilize a tour operator to arrange their travel, but rather used their own or their company’s arrangements. The travelers that used tour operators were more likely to have visited Italy (18.4%) or Greece (15.5%).

While it is logical that visitors with other purposes of travel would not have a high incidence of using tour operators, only 20.4% of holidaymakers used tour operators to arrange their trip.

5.2.2. Accommodation

Table 25: Accommodation by Purpose of Visit (Average Number of Nights in each Type of Accommodation, per tourist)

Accommodation Choice	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
Hotel	10.2	9.0	22.6	17.4	12.7	12.3	7.1	9.4	10.9
Rental Apartment	30.3	176.8	91.8	96.6	21.5	35.8	105.2	93.4	114.8
B&B / Hostel	9.9	7.5	175.3	28	21.3	30.0	9.5	7.4	13.1
Friend / Relative House	18.9	139.3	128.0	74.0	48.9	31.7	42.6	26.5	46.8
Other	10.1	146.2	150.2	43.6	23.8	25.8	14.7	45.2	61.7
Average No. of Nights per Tourist	14.1	133.2	117.9	63.2	26.8	18.3	41.9	30.3	47.0

As may be expected, those traveling for employment and education spent the most nights out of the country on average, at 133.2 and 117.9 nights respectively, while business and conference travelers had the shortest stays, with only 14.1 nights.

The most time spent in any single type of accommodation was in rental apartments, of which the average number of nights was 114.8. However, it is important to remember that this is slightly skewed because those traveling for employment, education, health treatment, and visiting friends and relatives were more likely to spend much longer periods of time out of the country, and therefore are significantly more likely to stay in a rental accommodation.

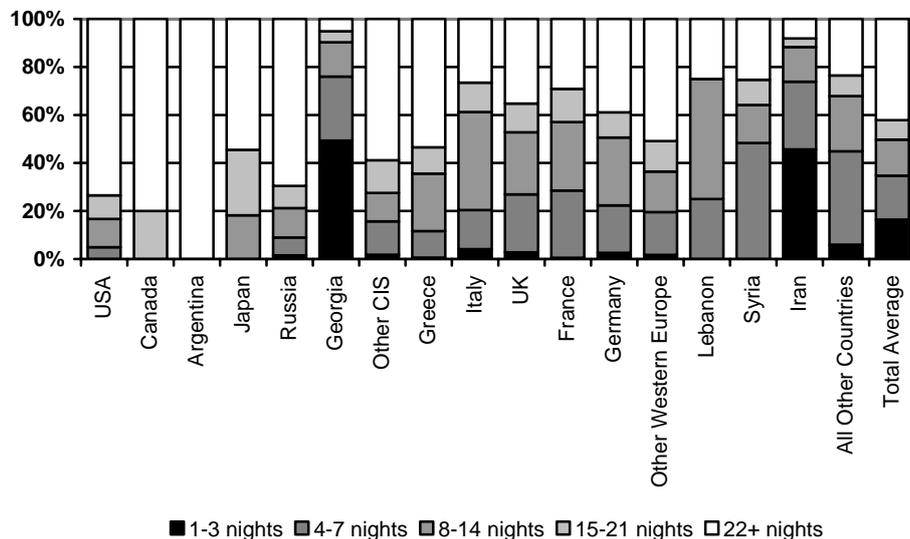
After rental apartments, “other” types of accommodation had the highest average number of nights, at 62.1, followed by friend and relative’s houses, at 46.8 nights. Hotels represented the shortest stay, at only 11 nights on average.

5.2.3. Length of Stay

Table 26: Length of Stay by Country Visited (%)

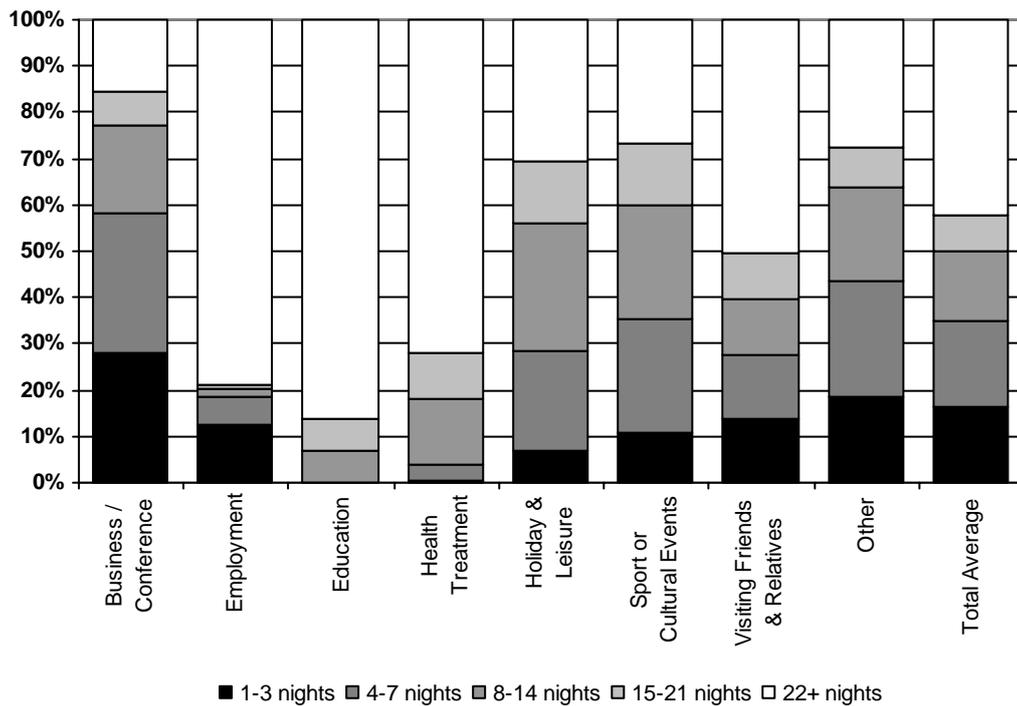
Length of Stay	USA	Canada	Argentina	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
1-3 nights	0	0	0	0	1.5	49.4	1.8	0.6	4.1	2.8	0.5	2.6	1.7	0	0	45.7	6.0	16.4
4-7 nights	4.9	0	0	0	7.5	26.6	13.9	11.0	16.3	24.1	28.0	19.7	17.8	25.0	48.4	28.2	38.9	18.3
8-14 nights	11.8	0	0	18.2	12.2	14.3	11.8	23.9	40.8	25.9	28.6	28.3	16.9	50.0	15.8	14.4	23.0	15.1
15-21 nights	9.8	20.0	0	27.3	9.2	4.6	13.6	11.0	12.2	12.0	13.8	10.5	12.7	0	10.5	3.6	8.6	8.1
22+ nights	73.5	80.0	100.0	54.5	69.6	5.1	58.9	53.4	26.5	35.2	29.1	38.8	50.8	25.0	25.3	8.1	23.5	42.1
Mean No. of Nights	74.8	118.0	144.5	33.5	80.9	6.8	73.9	75.4	23.8	46.4	24.8	31.8	48.4	20.5	28.9	12.0	26.3	49.0

Chart 29: Length of Stay By Country Visited (%)



The average number of nights spent out of country was 49. Travelers returning from the closest countries, Georgia and Iran, stayed for the shortest amount of time, with a mean of just 6.8 and 12 nights spent away respectively. Travelers to Argentina and Canada demonstrated the longest stays, however, removing those countries with limited data, Russia, Greece, and the US had the longest mean number of nights, with 80.9, 75.4, and 74.8 nights spent away, respectively. The latter is probably conditioned by the fact that the majority of people travelling for work depart for those countries.

Chart 30: Length of Stay by Purpose of Visit (%)



Those visitors traveling for the purpose of employment, education, health treatment, or visiting friends and relatives were most likely to stay away for 22+ nights, at 136.9, 122.6, 69.4, and 42.4 mean nights per category, respectively. Business and conference travelers had the shortest mean number of nights, with just 15.3, while the mean number of nights for holiday-makers was 27.9.

5.3. VISITOR EXPENDITURE

5.3.1. Average Expenditure per Head and Daily Expenditure

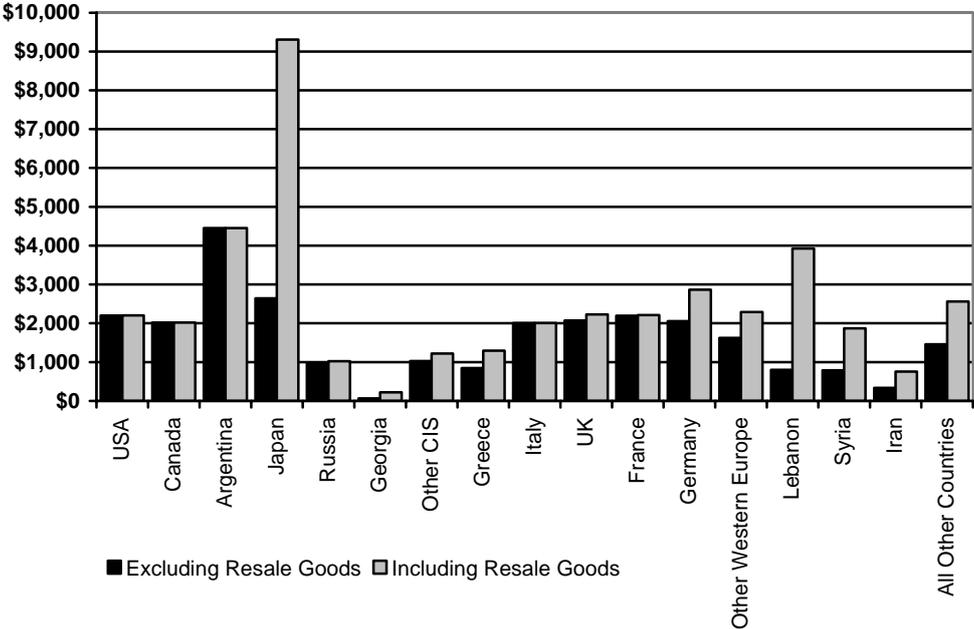
Table 27: Average per Head and Daily Expenditure by Travel Arrangement & Country Visited (USD) – including goods brought back for resale

Expenditure	USA	Canada	Argentina	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
PACKAGE TOURS																		
Average Total Expenditure	2600.0	0	0	0	1628.3	211.6	1021.0	1006.9	1837.3	2388.3	1941.6	2890.3	1920.6	0	1800.0	825.0	1473.1	1389.4
Average Length of Stay	8.5	0	0	0	12.9	7.1	13.4	18.2	12.6	14.6	10.9	14.3	22.3	0	7.0	9.3	10.7	12.1
Average Daily Expenditure	305.9	0	0	0	126.1	29.8	76.0	55.2	146.3	163.6	177.7	202.8	86.2	0	257.1	89.2	137.3	115.2
OWN ARRANGEMENT																		
Average Total Expenditure	2189.2	2017.7	4451.0	9309.0	1014.4	222.3	1221.8	1324.5	1938.1	2196.9	2199.4	2840.7	2281.9	3926.0	1867.4	754.2	2721.3	1024.6
Average Length of Stay	76.1	118.0	144.5	33.5	81.2	6.5	75.2	85.2	26.4	47.4	25.6	32.3	50.1	20.5	28.1	11.9	27.5	49.7
Average Daily Expenditure	28.8	17.1	30.8	277.5	12.5	34.1	16.2	15.5	73.6	46.3	85.9	87.9	45.5	191.5	66.4	63.2	99.1	20.6
TOTAL																		
Average Total Expenditure	2204.2	2017.7	4451.0	9309.0	1022.8	222.7	1221.8	1295.1	2006.8	2227.6	2213.2	2863.9	2288.5	3926.0	1870.4	755.8	2559.1	1045.5
Average Length of Stay	74.8	118.0	144.5	33.5	80.7	6.5	74.1	74.8	23.8	45.9	24.5	31.8	48.4	20.5	27.9	11.9	25.6	48.8
Average Daily Expenditure	29.5	17.1	30.8	277.5	12.7	34.1	16.5	17.3	84.3	48.5	90.3	90.0	47.2	191.5	67.0	63.4	100.1	21.4

The average expenditure per trip (among all types of travel arrangements) was \$1,045.50, with daily expenses of \$21.40. This is close to the average for those arranging their own travel, which had expenditure per trip of \$1,024.60 with daily expenses of \$20.60. However, those traveling with package tours spent significantly more on average; \$115.20 per day for a total trip price of \$1,389.40.

Average expenditure per trip was highest among visitors returning from “other countries” (\$100.10/day), France (\$90.30/day) and Germany (\$90.00/day). The lowest expenditures were among those that went to Georgia (\$12.70/day), other CIS countries (\$16.50/day), and Greece (\$17.30/day). This follows the trend of Diaspora visitors to Armenia (many of whom come from Georgia and other CIS countries), who often spend time with friends and relatives and therefore spend less on accommodation and restaurants. It is possible that this could also be due to exchange rates and costs in those countries.

Chart 31: Average Total Expenditure by Market Area (USD)



When goods brought back for resale are excluded from the data, the average spending per trip was reduced by about 20% (around \$200), from \$1,045.50 to \$812.20. In terms of those making their own travel arrangements, the average spending figure was reduced by about \$240. There were no differences among those who traveled through package tours.

Visitors to Japan and Lebanon showed the largest gaps (\$6,668 and \$3,126, respectively) between their spending including and excluding resale goods, which indicates that a large portion of their spending was dedicated to purchase of items for resale. Visitors to European and North American countries, for the most part, had only small differences in their spending when resale goods were excluded from the equation.

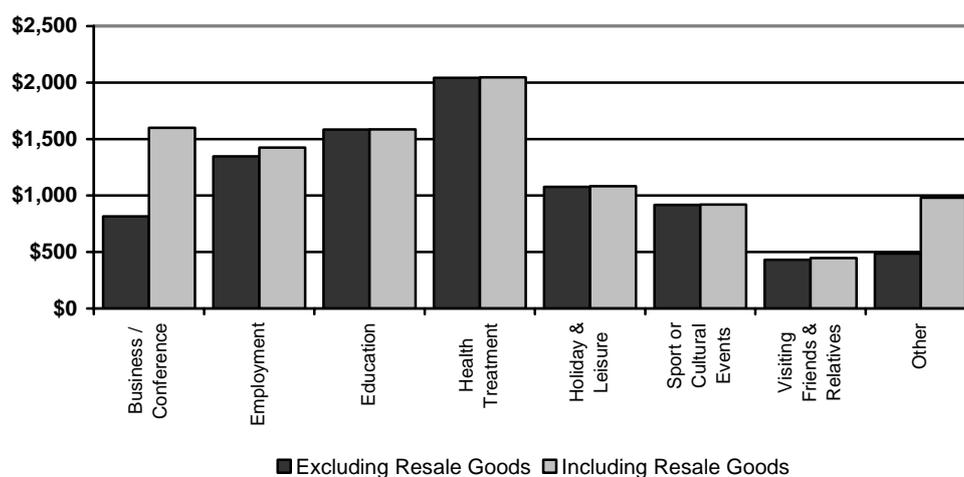
Table 28: Average per Head and Daily Expenditure by Travel Arrangement & Purpose of Visit (USD) – including goods brought back for resale

Expenditure	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
PACKAGE TOURS									
Average Total Expenditure					1451.3				1451.3
Average Length of Stay					12.1				12.1
Average Daily Expenditure					120.3				120.3
OWN ARRANGEMENT									
Average Total Expenditure	1599.9	1424.8	1585.3	2046.0	922.8	920.3	447.2	980.9	1025.1
Average Length of Stay	15.2	136.7	123.0	69.4	32.1	19.2	42.3	30.8	49.7
Average Daily Expenditure	105.0	10.4	12.9	29.5	28.8	48.0	10.6	31.8	20.6
TOTAL									
Average Total Expenditure	1599.9	1424.8	1585.3	2046.0	1082.9	920.3	447.2	980.9	1048.2
Average Length of Stay	15.2	136.7	123.0	69.4	28.0	19.2	42.3	30.8	48.8
Average Daily Expenditure	105.0	10.4	12.9	29.5	38.7	48.0	10.6	31.8	21.5

Visitors traveling for health treatment had the highest average expenditure per trip, however, business travelers had by far the highest expenditure per day, at \$105.00. Employment travelers had the lowest daily expenditure, at only \$10.40, but those visiting friends and relatives, as may be expected, had the lowest expenditure per trip, with only \$447.20 spent.

Holiday/leisure travelers, while not spending significantly when traveling on their own arrangements, were much more likely to spend in higher amounts when traveling with a package tour, with daily receipts of \$120.30, totaling \$1,451.30 per trip.

Chart 32: Average Total Expenditure by Purpose of Travel (USD)



Those traveling for business and for “other” reasons had the most significant gaps in their expenditure, with expenditures for business visitors and travelers visiting for “other” reasons doubling when resale goods were included. Those traveling for all other purposes did not have much discrepancy between expenditures with or without resale goods.

5.3.2. Average Itemized Expenditure

Table 29: Average Itemized Expenditure Before Departure for Tourists on Own Travel Arrangements by Country Visited (%)

Expenditure Item	USA	Canada	Argentina	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
International Transportation	81.8	91.4	96.4	85.5	74.9	45.9	74.6	77.6	85.5	83.3	82.0	81.6	75.3	76.7	72.7	64.6	85.4	75.9
Accommodation	0.1	0	0	1.8	0.6	1.0	0.2	1.9	0.0	0.5	1.5	1.1	1.5	0	0.5	1.1	2.2	0.8
Clothes & Travel Items	4.7	1.1	3.6	9.6	7.1	8.2	8.4	7.8	9.5	9.5	8.5	5.5	10.0	7	4.6	3.4	5.7	7.0
Domestic Ground Transportation	1.1	0.3	0	0.0	1.7	3.3	1.4	0.5	0.1	0.5	0.7	2.9	0.1	0	7.9	15.7	1.3	2.0
Other Spending	12.3	7.2	0	3.1	15.7	41.7	15.3	12.2	4.9	6.1	7.4	9.0	13.1	16.7	14.2	15.2	5.4	14.4
Average Total Expenditure (USD)	1702.9	1531.7	2800.0	1623.4	515.6	47.6	530.6	482.6	1055.7	821.4	746.3	761.9	850.9	500.0	483.3	155.6	528.5	394.0

Table 30: Average Itemized Expenditure Before Departure for Tourists on Own Travel Arrangements by Purpose of Visit (%)

Expenditure Item	Business /Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
International Transportation	83.1	81.3	75.8	77.5	76.4	80.2	70.2	67.9	75.9
Accommodation	1.9	0.8	0	0	1.4	1.7	0	0.5	0.8
Clothes & Travel Items	4.7	6.7	15.4	12.4	11.1	11.4	5.2	8.6	7.0
Domestic Ground Transportation	2.3	3.9	0.8	0.6	1.7	0.5	1.4	1.4	2.0
Other Spending	7.9	7.2	8.0	9.6	9.4	6.3	23.2	21.6	14.3
Average Total Expenditure (USD)	370.8	384.5	725.9	478.1	438.1	453.1	390.0	328.8	394.0

Itemized expenditure before traveling demonstrated that a large majority (75.9%) was spent on international travel, with slightly higher percentages spent in this category among visitors to those countries that are farther from Armenia. For example, visitors to North American countries, Argentina, Japan, and several Western European countries spent over 80% of their funding on international travel before their trip, while visitors to Armenia's neighboring countries, Georgia and Iran, spent the least in this category, at 45.9% and 64.6%, respectively.

"Other" spending comprised the next largest portion of travelers' budgets before traveling, at 14.4%, with visitors to Georgia spending the most in this category at 41.7%, and visitors to Japan spending the least at 3.1%. When categorized by purpose of visit, those visiting friends and relatives were the highest spenders in this area with 23.2%. For this group, the high percentage was likely due to gift purchases.

Spending on accommodation was particularly low, with an average of 0.8%, and visitors to no single country spending over 2% prior to their trip. If broken down by purpose of visit, business travelers spent the most, at 1.9%, while travelers for education, health treatment, and visiting friends and relatives spent 0% before arriving.

Table 31: Average Itemized Expenditure Whilst Overseas for Tourists on Own Travel Arrangements by Country Visited (%)

Expenditure Item	USA	Canada	Argentina	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Additional International Transportation	9.4	0	0	0	8.7	1.7	7.5	6.7	6.3	3.4	2.1	3.3	3.5	4.0	5.0	3.0	2.6	5.8
Accommodation	15.7	0	57.9	8.6	26.7	8.5	22.6	12.8	38.8	30.8	33.3	25.1	20.1	2.8	8.5	13.4	19.8	22.5
Restaurants & Bars	13.6	14.9	21.1	1.5	16.3	5.5	17.5	11.2	12.1	9.9	8.0	5.5	14.7	1.9	5.0	2.5	5.0	11.2
Organized Sightseeing Tours	7.8	21.3	7.9	1.6	2.5	0.6	1.7	3.2	8.8	7.1	6.5	2.7	6.0	0	1.0	0.9	2.1	2.6

Expenditure Item	USA	Canada	Argentina	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Domestic Transportation	3.3	0	0	0.3	4.2	1.7	2.5	1.0	0.4	1.5	0.5	1.6	2.6	0	0.2	4.0	0.8	2.7
Other Spending	49.9	63.8	13.2	5.3	38.0	8.9	29.4	19.1	33.6	37.8	48.6	26.8	17.8	8.6	14.9	15.8	16.4	28.6
Items of Resale in Armenia	0	0	0	83	3.6	73.2	18.8	45.8	0	9.4	1	35.1	35.2	82.8	65.3	60.6	53.3	26.6
Average Total Expenditure (USD)	1298.8	783.3	1900.0	8055.0	887.8	216.4	1058.4	1317.6	1310.8	1713.9	1937.5	2401.0	2043.2	3775.0	1694.2	691.2	2476.2	902.8

Table 32: Average Itemized Expenditure Whilst Overseas for Tourists on Own Travel Arrangements by Purpose of Visit (%)

Expenditure Item	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
Additional International Transportation	2.9	7.7	8.3	7.3	3.4	5.5	12.8	4.2	5.8
Accommodation	19.2	36.9	22.1	14.0	33.1	37.3	6.8	10.3	22.5
Restaurants & Bars	5.2	17.8	16.8	5.3	15.5	14.1	17.1	5.8	11.2
Organized Sightseeing Tours	0.9	0.7	9.5	0.3	8.4	6.8	5.5	1.0	2.6
Domestic Transportation	1.6	5.2	1.6	1.7	1.8	1.1	3.9	1.4	2.7
Other Spending	15.7	25.8	41.6	71.3	37.1	35.1	49.4	20.7	28.6
Items of Resale in Armenia	54.5	5.8	0	0.1	0.8	0.2	4.4	56.5	26.6
Average Total Expenditure (USD)	1438.8	1340.5	1422.9	1909.7	800.4	705.5	340.4	874.4	903.3

Once in country, “other” spending comprised the largest percentage, with 28.6% of spending being allocated to this category among all destination markets. However, the biggest spending was among those visitors to Canada (63.8%), the US (49.9%) and to France (48.6%), and with such high percentages, it would be interesting to find out what this spending constitutes. The visitors to Japan still spent the least in this category at 5.3%. When broken down by purpose of visit, those visiting for health treatment spent the most in the “other” category (71.3%), which was likely to be medical payments. They were followed by those visiting friends and relatives at 49.4%.

Items for resale in Armenia were the next largest category of consumption, at 26.6%. Visitors to Japan (83%), Lebanon (82.8%), and Georgia (73.2%) spent the most, while visitors to the US, Canada, Argentina, and Italy did not spend at all in this category. Those visiting for “other” reasons (56.5%) and for business (54.5%) were most likely to spend in this category (which may make sense if these purchases were part of their reason for travel), while education, health treatment, holiday/leisure, and sport and cultural event travelers all spent less than 1% on resale items.

Accommodation averaged 22.5%, while spending on restaurants and bars averaged only 11.2%. Sport and cultural event visitors spent the most on accommodation at 37.3%, while those visiting friends and relatives had only 6.8% spent on accommodation. Spending on restaurants and bars was highest among employment visitors (17.8%) and business travelers spent the least (5.2%), although this pattern may correlate to the amount of time spent in country.

The area of lowest spending was organized sightseeing tours, with only 2.6% of in-country spending. Visitors to those countries in closer proximity to Armenia, such as Georgia, Iran, and Syria tended to spend less in this category, as were health treatment and employment visitors, at 0.3% and 0.7%, accordingly. Those visiting for education and holiday/leisure were most likely to spend on organized tours at 9.5% and 8.4%, respectively.

5.3.3. Financing of Trip

Table 33: Financing of Trip by Country Visited (%)

Financing of Trip	USA	Canada	Argentina	Japan	Russia	Georgia	Other CIS	Greece	Italy	UK	France	Germany	Other Western Europe	Lebanon	Syria	Iran	All Other Countries	Total Average
Own Expense	45.1	80.0	100.0	45.5	73.1	92.3	71.8	77.6	62.7	48.6	46.0	48.3	56.0	75	80.7	83.4	75.2	76.8
Relatives or Friends Living Abroad	28.4	20.0	0	0	18.0	4.5	19.4	16.3	9.8	5.6	9.6	15.6	16.4	0	14.8	7.6	5.4	12.6
International / Foreign Organization	13.7	0	0	18.2	2.0	0.4	1.9	0.7	13.7	26.2	16.0	17.0	9.5	0	1	2.6	7.5	3.2
Business / Company	11.8	0	0	36.4	5.9	2.4	6.5	4.8	13.7	17.8	23.0	17.7	17.2	25.0	1.1	6.0	10.5	6.5
Other	1.0	0	0	0	1.0	0.4	0.5	0.7	0	1.9	5.3	1.4	0.9	0	2.3	0	1.4	0.9

Table 34: Financing of Trip by Purpose of Visit (%)

Financing of Trip	Business / Conference	Employment	Education	Health Treatment	Holiday & Leisure	Active Participation at Sport or Cultural Events	Visiting Friends & Relatives	Other	Total Average
Own Expense	72.3	90.8	40.4	60.8	86.5	21.5	73.5	87.6	76.8
Relatives or Friends Living Abroad	1.4	4.9	6.2	37.3	10.7	4.2	26.0	8.2	12.6
International / Foreign Organization	5.5	1.2	43.2	0.5	0.5	36.1	0.1	1.6	3.2
Business / Company	20.4	2.4	4.1	0	0.6	31.9	0.1	0.7	6.5
Other	0.4	0.7	6.2	1.4	1.7	6.3	0.3	2.0	0.9

The majority of visitors financed their own trip (76.8%), however a notable number of respondents (12.6%) were financed by friends or relatives living abroad. The remainder of visi-

tors were financed by international organizations (3.2%), businesses (6.5%) or other means (0.9%).

Visitors to North America were most likely to be financed by friends and relatives, with 28.4% of US visitors and 20% of Canada visitors responding that their financing came from this source. In terms of purpose of visit, those traveling for health treatments (37.3%) and those visiting friends and relatives (26%) were the most likely to be financed by friends and relatives.

Visitors to Western Europe, Japan, and the US were more likely to be financed by international organizations, with education (43.2%) and sport and cultural event visitors (36.1%) also more likely to be financed this way.

Those participating in sport and cultural events were also most likely to be sponsored financially by a company (31.9%), with business travelers following, at 20.4%.

5.3.4. Profit Received

Chart 33: Profit Received by Country Visited (% Yes)

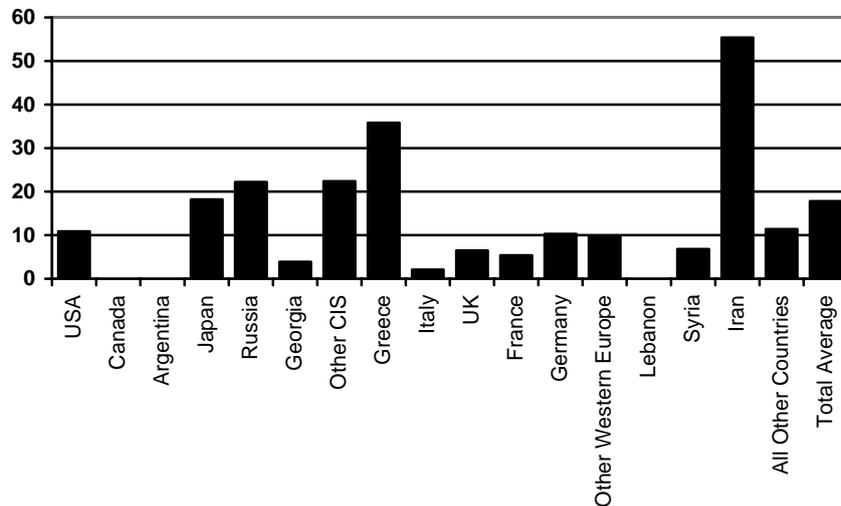
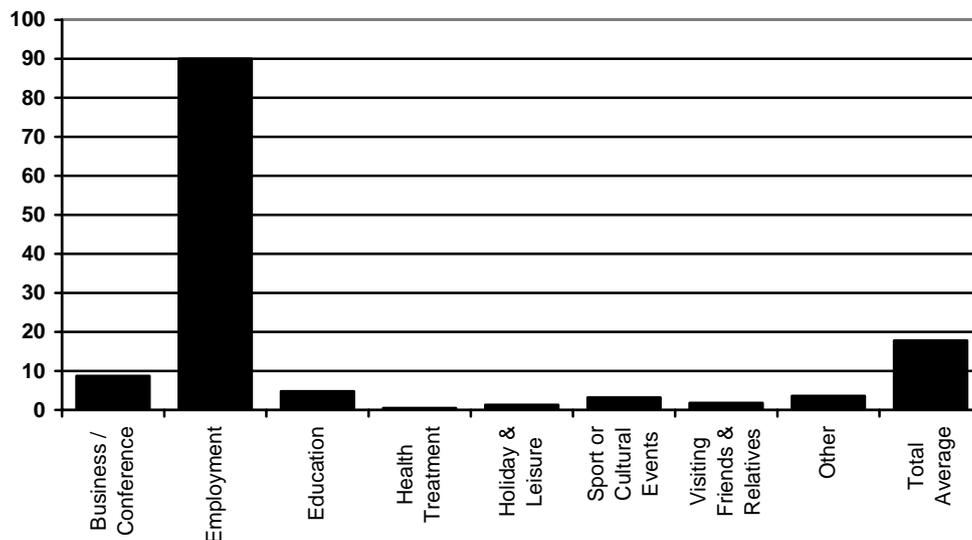


Chart 34: Profit Received by Purpose of Visit (% Yes)



The majority of respondents, 82.2%, did not receive any profit from work implemented or service rendered while traveling. Of the remaining 17.8%, travelers to Iran and Greece were most likely to receive profit from their time spent in country, at 55.4% and 35.8%, respectively. However, it should be noted that while travelers to Iran were most likely to make some profit, they were one of the lowest overall earners, with an average of \$623.20 in profit. Travelers to Italy and Georgia were least likely to receive profit from their trip, at 2.1% and 3.9%, accordingly. Travelers to Georgia were the lowest earners with only \$233.10 earned in profit on average. Travelers to Syria earned the most with \$4,833.30 average amount earned in profit.

Logically, those traveling for employment and business were most likely to receive profit from services rendered in country, at 90% and 8.7%, respectively. Employment travelers earned the most on average, at \$2,842.90. Health treatment travelers were least likely to receive any profit, at 0.5%. However, sport and cultural event visitors earned the least in total, at \$403.70 on average.

6. OBSERVATIONS AND CONCLUSIONS

It is clear from the results of the survey that Armenian ancestry has a significant effect on tourism in Armenia. The data implies that visitors with Armenian ancestry were coming in large part from Diaspora populations, and that by far the highest concentration of these populations were in Russia and Georgia. Unfortunately, the high concentration of Russian and Georgian Diaspora visitors is not as beneficial for the Armenian tourism industry as it could be, because while this group spent long amounts of time in country, they spent significantly less funds overall, particularly on accommodation, restaurants, and organized tours. These group also skewed the information on the length of stay, because those visiting for longer periods of time tend to be of Armenian descent or visiting friends and relatives.

This information also suggests that Armenia is also overly dependent upon the CIS for its tourist arrivals; based largely on historical factors but perhaps also because visa-free travel remains possible.

Therefore, it is important for the Armenian tourism industry to focus on attracting holiday-makers, who had the highest expenditures, and also visited the most regions, in order to grow. These types of visitors were primarily from North America and Western Europe, as well as Japan and the Middle East. Canadian visitors in particular had high expenditures in country and visited the most locations, therefore encouraging visitors from this source market, for example, could prove lucrative for Armenia.

It was evident that friends and relatives and previous visits were the primary sources of information for visitors to Armenia, indicating that Armenia needs to expand its reach into other tourism marketing channels in order to attract valuable first-time visitors from these source markets. The internet was not used as a main source of information about Armenia, but if websites on Armenian tourism are further developed, it may be possible to reach more new markets and segments of existing markets. The incidence of Internet bookings for travel to Armenia seems unusually low, therefore it may be speculated that in countries with the largest percentages of visitors, such as Russia, Georgia, and Iran, credit cards are not widely used for purchasing travel.

The data also demonstrated that there may not be much knowledge about Armenia as a destination, particularly among source markets that provide more holidaymakers. This would be linked to the sources of information data. Armenian heritage and Adventure Tourism/Ecotourism were listed as significant reasons that tourists visited Armenia, implying that these two niche markets could be further developed, in addition to further developing the more traditional natural, historical, and cultural tourist attractions.

The lack of repeat visits among tourists without Armenian ancestry implies that there is a market opportunity for first-time tourists and tourists without Armenian heritage, both of which tend to constitute holidaymakers. In addition, large proportions of tourists are visiting from regional countries, such as Georgia, Iran, Russia, and Syria, so attracting these visitors for holiday/leisure purposes, either with or without Armenian heritage, could help increase tourism expenditures.

Visitors with Armenian ancestry were more likely to stay with friends and relatives while in country, thereby spending less on accommodation and restaurants. The short average stay in typical tourist accommodations, such as hotels, B&Bs, hostels, and spas, especially among holiday/leisure, business, and sport and cultural event travelers, indicates an opportunity for these businesses to further improve their marketing and services in order to attract visitors to these types of establishments for a longer period of time, to make up for the limited spending in these areas coming from friend and relative travelers. It should also be noted that the 55+ tourists were more likely to visit Armenia for holidays or health treatment, and therefore catering services to this group could attract more visitors.

Expenditures were much higher among travelers visiting through package tours, therefore an opportunity exists for Armenia to earn more from tourism revenues if an increased number of visitors begins to travel through package tours (preferably arranged by Armenian tour operators). It is important to mention that holidaymakers are spending significant amounts of their budget on international travel (and therefore may be spending less, if traveling on own arrangements, on other services) since many holidaymakers are coming from distant countries, which makes it even more important to encourage package tours for increased spending. Armenian tourists traveling abroad also had a low incidence of traveling via package tours, and therefore revenue to Armenian tour operators could be increased if domestic tourists are targeted as well.

Finally, Yerevan was by far the most visited location in Armenia. Holidaymakers visited the most locations. While there are other places of interest in Armenia, there are not strong preferences for any particular areas among tourists. However, developing specific locations to better cater to tourists (such as Dilijan or Lake Sevan) could attract more tourism revenue outside of the capital.

ANNEX 1. DEPARTURE SURVEY QUESTIONNAIRE



NATIONAL STATISTICAL SERVICE OF THE REPUBLIC OF ARMENIA,
ARMENIAN TOURISM DEVELOPMENT AGENCY & COMPETITIVE
ARMENIA PRIVATE SECTOR PROGRAM (CAPS)



The survey is implemented according to the RA Law on National Statistics

Confirmed by August 2006 Resolution of the RA National Statistical Council

Departure Survey

One-Time Observation Questionnaire

Anonymity and confidentiality of the provided information is guaranteed by law

1. What is your country of citizenship?
(please, specify "stateless" for stateless persons)
- country code¹
2. What is your main country of residence?
- 2.1 Do you serve in an embassy, consulate or on a military base? Yes No

Note: DISCONTINUE the survey for RA residents and those serving in an embassy, consulate or military base.

3. When did you arrive Armenia? Day Month Year How many days did you stay?

Note: DISCONTINUE the interview if the visitor has not stayed at least 24 hours or stayed longer than one year

4. Do you have Armenian ancestry? Yes No

5. To which of the following age group do you belong?
- 17 or younger 18 – 35
36 – 55 56 and over

6. Gender:
- Male Female

¹ The country code is mentioned by coder.

7. What was the primary purpose of your trip ? (mark X in the appropriate box – one answer only)

- | | | | |
|-------------------------|--------------------------|--|--------------------------|
| 7.1 business/conference | <input type="checkbox"/> | 7.5 holiday and leisure | <input type="checkbox"/> |
| 7.2 employment | <input type="checkbox"/> | 7.6 active participation at sport or cultural events | <input type="checkbox"/> |
| 7.3 education | <input type="checkbox"/> | 7.7 visiting friends and relatives | <input type="checkbox"/> |
| 7.4 health treatment | <input type="checkbox"/> | 7.8 other | <input type="checkbox"/> |

If Holiday and leisure: Continue, Otherwise Go To Question 9

8. What was the main reason for choosing Armenia as your holiday destination? (multiple answers allowed)

- | | | | |
|-------------------------------------|--------------------------|------------------------------------|--------------------------|
| 8.1 nature | <input type="checkbox"/> | 8.5 ecotourism / adventure tourism | <input type="checkbox"/> |
| 8.2 historical/cultural attractions | <input type="checkbox"/> | 8.6 Armenian heritage | <input type="checkbox"/> |
| 8.3 pilgrimage | <input type="checkbox"/> | 8.7 other _____ | <input type="checkbox"/> |
| 8.4 special interest tours | <input type="checkbox"/> | | |

9. Have you visited Armenia before?

- Yes No

If Yes: Continue, Otherwise Go To Question 11

10. If yes, how many times have you visited Armenia before?

- 1 prior visit 2 prior visits 3 or more prior visits

11. What were your main sources of information on Armenia? (multiple answers allowed)

- | | | |
|---------------------------------|--------------------------|---------------------------------|
| 11.1 friends and relatives | <input type="checkbox"/> | |
| 11.2 previous visits | <input type="checkbox"/> | |
| 11.3 tour operator/travel agent | <input type="checkbox"/> | |
| 11.4 newspaper | <input type="checkbox"/> | |
| 11.5 travel guidebooks | <input type="checkbox"/> | |
| 11.6 radio/tv | <input type="checkbox"/> | |
| 11.7 internet which web site(s) | <input type="checkbox"/> | please specify which site _____ |
| 11.8 travel magazines | <input type="checkbox"/> | please specify _____ |
| 11.9 other | <input type="checkbox"/> | please specify _____ |

12. Was any part of your travel purchased online?

- Yes No

If Yes: Continue, Otherwise Go To Question 14

13. Please name the company or the website where the booking was made:

Hotel _____

Flight _____

14. Where did you stay during your visit ? (please, specify the number of nights in each type of accommodation)

14.1 hotel

14.2 rental apartment

14.3 B&B/ hostel

14.4 friend's or relative's house

14.5 spa

14.6 other accomodation

15. Please indicate the locations you visited and the number of nights stayed in each place. (Mark O if you visited a location but did not stay overnight)

15.1 Yerevan

15.2 Mount Aragats, Oshakan, etc. (Aragatsotn Marz)

15.3 Echmiadzin, Sardarapat, Zvartnots, etc. (Armavir Marz)

15.4 Lake Sevan (Gegharkunik Marz)

15.5 Garni, Geghard, Tsakhkadzor – winter sports and ski resort (Kotayk Marz)

15.6 Vanadzor, Akhtala, Haghpat, Sanahin Monasteries, etc. (Lori Marz)

15.7 Gyumri, Marmashen Monastery, etc. (Shirak Marz)

15.8 Dilijan, Haghartsin, Goshavank Monasteriesy, Makaravank (Tavush Marz)

15.9 Noravank, Jermuk spa resort (Vayots Dzor Marz)

15.10 Khor Virap Monastery, etc. (Ararat Marz)

15.11 Tatev Monastery, Khndzoresk [Cave City], Zorats Karer, etc. (Syunik Marz)

15.12 Republic of Nagorno Karabakh

16. Are you travelling on a package tour, did your company make travel arrangements or did you make your own travel arrangements

16.1 Package Tour

16.2 Myself, my company/partner company

If Package Tour: Continue, Otherwise Go To Question 19

17. How much did you pay for your package tour including yourself and your family members if any?

Amount Currency Code

17.1 How many persons does this expenditure cover?

17.2 Does this package price include international transporation? Yes No

17.3 If no, how much did you (and your family members, if any) spend on international transportation? Amount Currency Code

17.4 Does the package price include stays in other countries?

If yes, please indicate where _____

18. In all, how much did you (and your family members travelling with you, if any) spend during your stay here in Armenia (excluding all pre-paid expenditure items)?

Amount Currency Code

Now go to question 21

For Visitors that have made their own travel arrangements or whose companies have made arrangements

19. In all, how much did you (and your family members travelling with you, if any) spend prior to and during your stay in Armenia

19.1 Amount Currency Code

19.2 How many persons does this expenditure cover?

20. Please indicate, to the best of your ability, how much you spent on the following items prior to and during your stay in Armenia

	Amount	Currency
20.1 International Transportation	<input type="text"/>	<input type="text"/>
20.2 Accommodation (including room charges, food/beverage, etc)	<input type="text"/>	<input type="text"/>
20.3 Restaurants and bars (outside places of stay)	<input type="text"/>	<input type="text"/>
20.4 Organized sightseeing tours, excursions and activities	<input type="text"/>	<input type="text"/>
20.5 Domestic ground transportation (car rental, petrol, taxi)	<input type="text"/>	<input type="text"/>
20.6 Handicrafts and Souvenirs	<input type="text"/>	<input type="text"/>
20.7 Other spending (service, etc.)	<input type="text"/>	<input type="text"/>
20.7 How many persons does this expenditure cover?	<input type="text"/>	

For all visitors

21. If you ever used any of the following, how would you, in general, rate the quality? Would you say it was: 5 – Excellent, 4 – Good, 3 – Satisfactory, 2 – Poor, 1 – Very Poor

21.1 hotels	<input type="text"/>	21.6 international transportation	<input type="text"/>
21.2 restaurants	<input type="text"/>	21.7 local roads	<input type="text"/>
21.3 spas	<input type="text"/>	21.8 attractions (museums, galleries, etc)	<input type="text"/>
21.4 tour operators	<input type="text"/>	21.9 guide services	<input type="text"/>
21.5 general value for money	<input type="text"/>	21.10 efficiency of border services	<input type="text"/>

22. Do you have an interest or plan to visit Armenia again?

yes no

23. Would you recommend Armenia to your friends and relatives for a holiday visit?

yes no

Thank you for the interview

	Interviewer (S.N., number)	Questionnaire number	Date	Place of completion (airport, cross-border)	Code ¹	Flight Number	Country's means of transportation Armenian – 1 Non Armenian - 2
Inbound							
Outbound							

ANNEX 2. ARRIVAL SURVEY QUESTIONNAIRE



NATIONAL STATISTICAL SERVICE OF THE REPUBLIC OF ARMENIA,
ARMENIAN TOURISM DEVELOPMENT AGENCY & COMPETITIVE
ARMENIA PRIVATE SECTOR PROGRAM (CAPS)



The survey is implemented according to the RA Law on National Statistics

Confirmed by August 2006 Resolution of the RA National Statistical Council

Arrival Survey

One-Time Observation Questionnaire

Anonymity and confidentiality of the provided information is guaranteed by law

- country code²
1. What is your country of citizenship?
(please, specify “stateless” for stateless persons)
2. What is your main country of residence?
- 2.1 Do you serve in an embassy, consulate or on a military base? Yes No

Note: DISCONTINUE the survey for Non RA residents and those serving in an embassy, consulate or on a military base

- How many days did you stay?
3. When did you depart Armenia? Day month year

Note: DISCONTINUE the interview if the visitor has not stayed at least 24 hours or stayed longer than one year

- country code¹
4. From which country have you departed (excluding transit stops)?
5. To which of the following age group do you belong?
- 17 or younger 18 – 35
36 – 55 56 and over
6. Gender:
- Male Female

¹ The country code is mentioned by coder.

7. What was the primary purpose of your trip? (mark X in the appropriate box – one answer only)

- | | | | |
|-------------------------|--------------------------|--|--------------------------|
| 7.1 business/conference | <input type="checkbox"/> | 7.5 holiday and leisure | <input type="checkbox"/> |
| 7.2 employment | <input type="checkbox"/> | 7.6 active participation at sport or cultural events | <input type="checkbox"/> |
| 7.3 education | <input type="checkbox"/> | 7.7 visiting friends and relatives | <input type="checkbox"/> |
| 7.4 health treatment | <input type="checkbox"/> | 7.8 other | <input type="checkbox"/> |

8. Where did you stay during your visit ? (please, specify the number of nights in each type of accommodation)¹

- | | | | |
|----------------------|--------------------------|----------------------------------|--------------------------|
| 8.1 hotel | <input type="checkbox"/> | 8.4 friend's or relative's house | <input type="checkbox"/> |
| 8.2 rental apartment | <input type="checkbox"/> | 8.5 other accommodation | <input type="checkbox"/> |
| 8.3 B&B/ hostel | <input type="checkbox"/> | | |

9. Were you travelling on a package tour, did your company make travel arrangements, or did you make your own travel arrangements

- | | |
|--|--------------------------|
| 9.1. Package Tour | <input type="checkbox"/> |
| 9.2 Myself, my company/partner company | <input type="checkbox"/> |

If Package Tour: Continue, Otherwise Go To Question 12

10. How much did you pay for your package tour including yourself and your family members if any?

- Amount Currency Code
- 10.1 How many persons does this expenditure cover?
- 10.2 Does this package price include international transportation? Yes
- 10.3 If no, how much did you (and your family members, if any) spend on international transportation? Amount Currency Code

11. In all, how much did you (and your family members travelling with you, if any) spend during your overseas trip (excluding all pre-paid expenditure items)?

- 11.1 Amount Currency Code

Now go to question 14

For Visitors that have made their own travel arrangements or whose companies have made arrangements

12. Please indicate, to the best of your ability, for this trip, how much you and your family members spent on the following items PRIOR to departing Armenia?

	Amount	Currency
12.1 International Transportation (air, train, car)	<input type="text"/>	<input type="text"/>
12.2 Accommodation	<input type="text"/>	<input type="text"/>
12.3 Clothes and Travel Items	<input type="text"/>	<input type="text"/>
12.4 Domestic ground transportation (petrol, taxi)	<input type="text"/>	<input type="text"/>
12.5 Other spending (gifts for friends & relatives)	<input type="text"/>	<input type="text"/>
12.6 How many persons does this expenditure cover?	<input type="text"/>	

13. Please indicate, to the best of your ability, how much you and your family members spent on the following items WHILST OVERSEAS?

	Amount	Currency
13.1 Additional International Transportation (air, train, car)	<input type="text"/>	<input type="text"/>
13.2 Accommodation (including room charges, food/beverage, etc)	<input type="text"/>	<input type="text"/>
13.3 Restaurants and bars (outside places of stay)	<input type="text"/>	<input type="text"/>
13.4 Organized sightseeing tours, excursions and activities	<input type="text"/>	<input type="text"/>
13.5 Domestic transportation (car rental, petrol, taxi)	<input type="text"/>	<input type="text"/>
13.6 Other spending (Handicrafts, souvenirs, shopping, etc)	<input type="text"/>	<input type="text"/>
13.7 How many persons does this expenditure cover?	<input type="text"/>	
13.8 How much did you spend on products for resale in Armenia?	<input type="text"/>	<input type="text"/>

For all visitors

14. How was your trip financed (mark X in the appropriate box)

- 15.1 At own expense
- 15.2 By relatives or friends living abroad
- 15.3 International or other foreign organizations
- 15.4 Business / Company
- 15.5 Other (please specify) _____

15. Have you received any profit from work implemented and services rendered while abroad?

- 15.1 Yes No
- 15.2 If yes, please specify the Amount Currency

Thank you for the interview

	Interviewer (S.N., number)	Questionnaire number	Date	Place of completion (airport, cross-border)	Code ¹	Flight Number	Country's means of transportation Armenian – 1 Non Armenian - 2
Inbound							
Outbound							



Republic of Armenia
0002 Yerevan, 26/3 Sarian str.
Tel.: + (374 10) 538 658; 500 533
E-mail: info@caps.am
Website: www.caps.am