



**USAID**  
FROM THE AMERICAN PEOPLE

# FRENCH TOUR OPERATORS' OPINIONS & PERCEPTIONS OF ARMENIA

MARCH 2010

This publication was produced for review by the United States Agency for International Development. It was prepared by the Competitive Armenian Private Sector (CAPS) Project.

# **FRENCH TOUR OPERATORS' OPINIONS & PERCEPTIONS OF ARMENIA**

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

<b>1. OBJECTIVES OF THE FOREIGN TOUR OPERATORS' SURVEY .....</b>	<b>4</b>
1.1.    FTOs FROM FRANCE .....	4
1.1.1. <i>French TOs Profile .....</i>	4
1.1.2. <i>French TOs Organizing Tours to Armenia.....</i>	5
1.1.3. <i>Satisfaction Rate of French TOs about Armenia.....</i>	5
1.1.4. <i>French TOs Characterizing Armenia and the Armenian Nation .....</i>	5
1.1.5. <i>French TOs on Countries Similar to Armenia.....</i>	7
1.1.6. <i>SWOT for Armenia Tourism in French Market.....</i>	7
<b>ANNEX 1: FRENCH TOUR OPERATOR'S SURVEY REPORTING TABLES.....</b>	<b>9</b>
SECTION 1: TOs CURRENTLY ORGANIZING TOURS TO ARMENIA .....	9
SECTION 2: TOs NOT OFFERING TRIPS TO ARMENIA .....	19

# 1. OBJECTIVES OF THE FOREIGN TOUR OPERATORS' SURVEY

This Survey of French Tour Operators can assist the Armenian tourism industry in improving the promotion and perception of Armenia as a tourism destination in the French market. It is important that Armenian tourism enterprises and promotional bodies reinforce **positive images**, work on changing **unjustified negative images**, and minimize the destructive effect of **justified negative images**.

The survey queried the following points:

- The satisfaction level of Armenian tour products and services by foreign tour operators that already operate tours to Armenia (and indirectly their clients)
- The awareness and perception of foreign tour operators that do not operate tours to Armenia regarding the country as a holiday destination
- The opinions of tour operators about the advantages/disadvantages of Armenia as a holiday destination
- The willingness of potential tour operators to add Armenia in their list of new destinations
- The positive and negative images of Armenia and Armenian nation

## 1.1. FTOs FROM FRANCE

A total of 311 foreign tour operators (FTOs) participated in the survey. The survey was distributed in 4 languages: English, Russian, Italian, and French. 8.7% of the FTOs (27 tour operators) answered the survey in French and were based in France<sup>1</sup>.

### 1.1.1. French TOs Profile

23 of the 27 respondents indicated that they were currently organizing tours to Armenia. Therefore, 4 were not offering tours to Armenia, but were considering Armenia as a potential destination.

Table 1: Number of years of operation of French tour operators<sup>2</sup>

Years/French TOs	French TOs offering tours to Armenia	French TOs not offering tours to Armenia	Total	Response Percent
1-5 years	10	0	10	37.04%
6-10 years	4	0	4	14.81%
11-15 years	2	1	3	11.11%
16+ years	3	0	3	11.11%

Very few French TOs (4) not organizing tours to Armenia participated in the survey and even fewer (3) answered all the questions. It is therefore not possible to analyze their responses and draw any meaningful conclusions. The tables of results are presented in the Annex.

<sup>1</sup> Two non-France-based tour operator also answered the survey and is included in the results.

<sup>2</sup> Please note that total number of responses in the table do not equal the number of survey respondents, since not all TOs chose to answer all the questions (see ANNEX 1 for the explanation).

### 1.1.2. French TOs Organizing Tours to Armenia

The results summarized below represent answers from the 23 French TOs, currently offering tours to Armenia. Detailed answers are in Annex 1: France FTO Survey Tables.

- 78.9% of French TOs mentioned that they found their Armenian partner by word of mouth and/or direct email,
- 42% started their business with Armenia prior to or in 2005,
- 52.6% had 4-10 departures in 2008,
- 68.4% do not have repeat clients to Armenia,
- 42.1% offer tours just to Armenia, rather than regional /Caucasus trips.

### 1.1.3. Satisfaction Rate of French TOs about Armenia

- To a large extent, French TOs are satisfied with their **Armenian partner** (93.4%). Some of them (5) mentioned that they occasionally slip up in one or two elements of the trip generating a few complaints and need to be more prompt and detailed with responses.
- According to the French TOs, **accommodations** are satisfactory for the needs of French clients, but are expensive for the quality of the facilities and services provided. The facilities are somewhat limited and customer service could be improved, although the accommodation is clean (57.1%).
- The **attractions** are clearly of national and regional cultural value and are generally well presented for visiting tourists. However, small improvements could be made to impart greater information or provide basic tourist facilities (food, toilets, etc) (57.1%)
- Compared to other countries, Armenia is **overpriced**. The facilities and services are generally good but not worth the costs that are being charged (78.6%).
- Mostly, tourists have not expressed considerable complaints. However one issue, worth mentioning, was emphasized by 2 respondents: “repetitive visits to churches and monasteries” and “too religious cultural”, indicating a monotonous character to tours.
- The two most important factors French TOs suggest to improve Armenia’s tourism product are more communication and information about almost anything (including food, nature, and history) and the quality of accommodation (see Table 1).

Table 1: French TOs on factors to be improved in Armenia’s Tourism Product

Popular responses	Infrequent responses	Rare responses
4-5 responses	2-5 responses	1 response
Information/communication	Roads	Improve the tourist bus fleet
Accommodation	Costs	Music, culture, painting

### 1.1.4. French TOs Characterizing Armenia and the Armenian Nation

- Most of the French TOs describe Armenia to potential tourists as a country rich with culture and natural beauty (see Table 2). Comments made, such as:
  - Cultural and natural wealth
  - Rich heritage in history, cultural and religious

Table 2: Words French TOs use to describe Armenia to Potential Tourists

Popular responses	Infrequent responses	Rare responses
5-7 responses	2-4 responses	1 response
Culture	Welcoming	Mystic past
Nature and landscape	Good food, very tasty	Diversified
	Off-the-beaten track	Rapidly developing
		Francophile
		Monasteries
		Customs and traditions
		Not a tourist country
		Novelty

- When considering Armenia, potential tourists express concern on: security, whether there is anything to see there and the borders being closed.
- French tourists, after returning, typically describe Armenia as welcoming! A couple of comments also mention that tourists describe Armenia as a country of rich history and culture. (See Table 3); feelings that coincide with the descriptions given by the tour operators.

Table 3: Words French Tourists use to describe Armenia

Popular responses	Infrequent responses	Rare responses
4 responses	2-4 responses	1 response
Welcoming	Culturally and historically rich	Impressive
No feedback	Costs	Surprising
		Scenic
		Developing

- French TOs mention Armenia's unique selling point as a monastery. (Table 4)

Table 4: French TO About Armenia's USPs

Popular responses	Infrequent responses	Rare responses
3 responses	2 responses	1 response
Geghard	Tatev	Monasteries
	Sevan	Monastery Haghpats
		Garni Temple
		Khor Virap
		Etchmiadzin
		Landscapes
		Yerevan

- French TOs suggested the following 'Tag lines' to promote Armenia
  - Cradle of Christianity
  - Armenia: more diverse than you would have thought!
  - Armenia, the friendly country!
  - Armenia ... Oh Yes!
  - Art and Splendor of Armenia!
  - Nature and Culture!
  - Ancient culture
  - Land of hospitality and culture

1.1.5. French TOs on Countries Similar to Armenia

12 responses from French TOs highlighted countries that they believe have similar tourist attractions and products to Armenia. The top two countries were listed as follows (Table 5).

- a) **Georgia**
- b) **Uzbekistan**

Table 5: French TOs on Countries with Experiences Similar to Armenia

Popular responses	Rare responses
4 responses	1 response
Georgia	Mongolia
Uzbekistan	Albania
	Jordan
	Turkey
	Macedonia

Compared to those countries, the experience of Armenia's visitors is similar (58.3%), however costs in Armenia are more expensive (75%). Since French TOs started offering tours to Armenia, the interest among the clients towards Armenia has increased (58.3%).

1.1.6. SWOT for Armenia Tourism in French Market

<b>STRENGTHS (positive perception)</b>	<b>WEAKNESSESS (negative perceptions)</b>
1) Those French TOs that started their business in Armenia in or prior to 2005 still continue working in Armenia and the interest of French tourists towards Armenia has increased 2) French TOs operating in Armenia are highly satisfied with their Armenian partner and had 4-10 departures to Armenia in 2008 3) No serious complaints have been made by French tourists visiting Armenia 4) French TOs' description of Armenia's tourism product as historical and cultural, and the nation as welcoming, corresponds to their tourists' feedback when they return 5) French TOs provide very interesting and attractive tag-lines for promoting Armenia	1) Lack of communication is a problem, indicating why some comments suggest there is nothing to see in Armenia 2) 68.4% of French Tour Operators do not have repeat clients to Armenia 3) Tours are monotonous and not diversified 4) Concerns about security, due to lack of communication or miscommunication about border issues and other political problems 5) Price is a serious issue mentioned by TOs and tourists. Compared to other similar countries, Armenia is overpriced. 6) Quality and availability of accommodations

<b>OPPORTUNITIES</b>	<b>THREATS</b>
<ol style="list-style-type: none"><li>1) French market is growing (26% annual growth)</li><li>2) French market has unutilized opportunities (new segments of population, young and middle aged can be reached)</li><li>3) Word of mouth marketing works very well in France; this is how 42.1% of TOs found their Armenian partners. More than 30 TOs now feature Armenia. This can be used for guerilla marketing (point 8 talks about this as well)</li><li>4) Armenia's tourism products should be diversified to meet the needs of the diverse segments of French market (weekend tours, religious tours, authentic experiences)</li><li>5) It is accessible to Armenia; 5 direct flights + 20 indirect flights</li><li>6) Positive and truthful perceptions and interesting tag lines can be used in promotional actions and materials</li><li>7) Armenian TOs should become more familiar with the French market, especially their former clients in the social media: French people like to learn, engage &amp; share</li></ol>	<ol style="list-style-type: none"><li>1) Lack of activity by public or private sector tourism representatives</li><li>2) Other destinations more active in their promotion in France</li><li>3) Political conflicts with neighboring countries and closed borders</li><li>4) Ignoring potential markets</li><li>5) Economic downturn – destination retrenchment</li></ol>

## ANNEX 1: FRENCH TOUR OPERATOR'S SURVEY REPORTING TABLES

### Question 1

Please specify whether you are currently organizing trips to Armenia or you are considering to offer trips to Armenia.		
Answer Options	Response Percent	Response Count
Currently organizing trips to Armenia	85.2%	23
Considering to offer trips to Armenia	14.8%	4
<b>answered question</b>		<b>27</b>
<b>skipped question</b>		<b>0</b>

### Section 1: TOs currently organizing tours to Armenia

#### Question 2

How did you identify your Armenian partner? (Please select <u>all</u> that apply)		
Answer Options	Response Percent	Response Count
Direct mail/email – Armenian partner identified us	36.8%	7
Word of Mouth	42.1%	8
Through a familiarization tour	10.5%	2
Advertisement in consumer or travel trade magazine	0.0%	0
At a Tourism/Travel Exhibition	21.1%	4
Introduction through the Armenian Tourism Development	0.0%	0
Other (please specify)	10.5%	2
<b>answered question</b>		<b>19</b>
<b>skipped question</b>		<b>4</b>

No	Response Date	Other (please specify)
1	5/18/2009 10:07	Recommendation by our keynote
2	6/3/2009 8:51	We resell products of the Balaguere TO

#### Question 3

For how many years have you been in operation?		
Answer Options	Response Percent	Response Count
1-5	52.6%	10
6-10	21.1%	4
11-15	10.5%	2
16+	15.8%	3
<b>answered question</b>		<b>19</b>
<b>skipped question</b>		<b>4</b>

## Question 4

How long have you been offering tours to Armenia?		
Answer Options	Response Percent	Response Count
First tour undertaken in 2008	26.3%	5
Since 2007	26.3%	5
Since 2006	5.3%	1
Since 2005	15.8%	3
Prior to 2005	26.3%	5
<b>answered question</b>		<b>19</b>
<b>skipped question</b>		<b>4</b>

## Question 5

How many scheduled departures did you have for trips in 2008 that included Armenia?		
Answer Options	Response Percent	Response Count
1-3	47.4%	9
4-6	26.3%	5
7-9	21.1%	4
10+	5.3%	1
<b>answered question</b>		<b>19</b>
<b>skipped question</b>		<b>4</b>

## Question 6

Do you have repeat clients to Armenia?		
Answer Options	Response Percent	Response Count
Yes	31.6%	6
No	68.4%	13
<b>answered question</b>		<b>19</b>
<b>skipped question</b>		<b>4</b>

## Question 7

Do your tours to Armenia include other neighboring countries?		
Answer Options	Response Percent	Response Count
Just Armenia	42.1%	8
Armenia & neighboring countries (including Karabagh)	47.4%	9
More than one type of trip provided (some of them just to Armenia, some regional)	10.5%	2
<b>answered question</b>		<b>19</b>
<b>skipped question</b>		<b>4</b>

Question 8

Which of the following statements do you feel best describes your feelings toward your Armenian partner? Our Armenian partner:		
Answer Options	Response Percent	Response Count
Is fully aware of the type of clients we send. (their needs and interests); Consistently provides quality tours with experienced guides; Never generates complaints; works with professionalism and courtesy	57.1%	8
Provides quality tours and good guides that the majority of our clients are happy with; Occasionally slips up in one or two elements of the trip generating a few complaints that filter back to us; Generally good in maintaining communication but could be more prompt and detailed with responses	35.7%	5
Does not provide good value for money. They do what is required but with little enthusiasm or interest. This results in a significant number of complaints.	7.1%	1
Please elaborate on your answer, if appropriate		2
<b>answered question</b>		<b>14</b>
<b>skipped question</b>		<b>9</b>

Number	Response Date	Please elaborate your answer, if applicable.
1	May 22, 2009 8:06 AM	Is also aware of the specific difficulties we face, and still is arranging for us to sell more and better ...
2	Jun 4, 2009 9:01 AM	Very good feedback No Customers who traveled to Armenia

Question 9

Which of the following statements do you feel best describes your opinion of Armenian accommodation? Accommodation provided to our clients in Armenia is generally:		
Answer Options	Response Percent	Response Count
Always excellent value for money, provides high quality functioning, modern and attractive and clean facilities combined with excellent customer service from friendly and professional staff	14.3%	2
Is satisfactory for the needs of our clients but is expensive for the quality of the facilities and services provided. The facilities are somewhat limited and customer service could be improved but the accommodation is clean.	57.1%	8
Is not really satisfactory for our clients but we recognize that Armenia is not a mature tourism destination and that as such, we cannot expect much. Facilities especially outside Yerevan are old, the service is adequate and cleanliness is not up to much. We would prefer our guests to stay elsewhere but know that accommodation is limited	7.1%	1
Very poor and generates significant complaints. We simply have to find somewhere else to put our clients.	0.0%	0

**Which of the following statements do you feel best describes your opinion of Armenian accommodation?**

**Accommodation provided to our clients in Armenia is generally:**

Answer Options	Response Percent	Response Count
Is very mixed in the quality of facilities and services provided and cannot be easily categorized into one of the choices above.	21.4%	3
Please elaborate, if applicable		1
<b>answered question</b>		<b>14</b>
<b>skipped question</b>		<b>9</b>

No	Response Date	Please elaborate, if applicable
1	May 22, 2009 8:06 AM	Sometimes we may finally have a better class of hotel than originally advertised and sold to the customer.

### Question 10

**Which of the following statements do you feel best describes your opinion of Armenian tourist attractions? Armenian cultural, historic and religious attractions:**

Answer Options	Response Percent	Response Count
Provide an enviable experience as a result of knowledgeable guides, information boards and materials and souvenirs. The attractions are immaculately kept, well signposted and provide ideal tourism services (food & beverage, toilets, shops)	28.6%	4
Are clearly of national and regional cultural value and are generally well presented for visiting tourists. However, small improvements could be made to impart greater information or in the provision of basic tourist facilities (food, toilets, etc)	57.1%	8
Are largely undervalued and poorly maintained. There is no information available for visitors and little in the way to see or do. Tourist facilities are completely lacking.	7.1%	1
Vary in the quality of the facilities, information and service provided. Some are great while others are really poor.	7.1%	1
Please, if necessary, provide with more detailed answer		1
<b>answered question</b>		<b>14</b>
<b>skipped question</b>		<b>9</b>

No	Response Date	Please elaborate, if applicable
1	May 18, 2009 10:11 AM	Armenia's cultural, human and religious heritage is so rich, that our clients always return satisfied from their trips. We are starting to have very good guides which is very important for good understanding of Armenia's heritage.

## Question 11

Compared with other countries in the region, we consider Armenia to:		
Answer Options	Response Percent	Response Count
Offer excellent value for money. The quality of the facilities and services provided (accommodation, transportation, attractions, tour guides) are high and very reasonably priced.	21.4%	3
Be overpriced. The facilities and services are generally good but not worth the costs that are being charged.	78.6%	11
Offer poor value for money. Facilities and services are poor and ridiculously priced.	0.0%	0
Please give more detailed answer, if necessary.		0
<b>answered question</b>		<b>14</b>
<b>skipped question</b>		<b>9</b>

## Question 12

What three things do your tourists complain about most after a trip to Armenia (please list in order of most complaints received)?		
Answer Options	Response Percent	Response Count
1.	100.0%	14
2.	35.7%	5
3.	14.3%	2
<b>answered question</b>		<b>14</b>
<b>skipped question</b>		<b>9</b>

No	Response Date	1	2	3
1	5/18/2009 10:11	Accommodation Summary		
2	5/18/2009 11:19	Repetitive visits to churches and monasteries	Road	
3	5/19/2009 7:20	Fees to be paid for	High sales price	
4	5/19/2009 8:24	Hotel facilities	Roads	Diversity of food
5	5/22/2009 8:06	Comfort hotels and quality food outside Yerevan	The performance of Some local guides	Unexpected closure of Some sites to visit
6	5/22/2009 10:23	High tariff		
7	6/3/2009 8:33	No complaint		
8	6/3/2009 8:43	No complaint		
9	6/3/2009 8:53	No complaint		
10	6/3/2009 9:08	No complaints		
11	6/4/2009 9:01	Too religious cultural	Image "antiquated" destination	
12	6/4/2009 14:06	No complaint		

Note: 2 responses were not understandable

## Question 13

Based on feedback from your tourists, what three things should the Armenian tourism industry do to improve the overall tourism product?

Answer Options	Response Percent	Response
1.	100.0%	14
2.	28.6%	4
3.	21.4%	3
<b>answered question</b>		<b>14</b>
<b>skipped question</b>		<b>9</b>

Nº	Response Date	1.	2.	3.
1	May 18, 2009 10:11 AM	Accommodation		
2	May 18, 2009 11:19 AM	Road		
3	May 19, 2009 7:20 AM	4 star establishment with reasonable prices		
4	May 19, 2009 8:24 AM	Improve the park hotelier	Improve the tourist bus fleet	Improve roads
5	May 22, 2009 8:06 AM	Quality of hotels (and food) outside Yerevan	Reducing some costs, too expensive for the region	
6	May 22, 2009 10:23 AM	The cost of benefits		
7	Jun 3, 2009 8:33 AM	I do not know		
8	Jun 3, 2009 8:43 AM	Communicate more		
9	Jun 3, 2009 8:53 AM	Reduce rates of accommodation	Communicate more	Provide more information
10	Jun 3, 2009 9:08 AM	Quality accommodation	Communicating food	Communicating the nature and history of the Civil
11	Jun 4, 2009 9:01 AM	Music, cultural (painting ,...)		
12	Jun 4, 2009 2:06 PM	I do not know		

Note: 2 responses were not understandable

## Question 14

What words do tourists use to describe Armenia once they have returned?

Answer Options	Response Percent	Response Count
1.	100.0%	12
2.	33.3%	4
3.	33.3%	4
<b>answered question</b>		<b>12</b>
<b>skipped question</b>		<b>11</b>

No	Response Date	1.	2.	3.
1	May 18, 2009 11:22 AM	Visits varied little		
2	May 19, 2009 7:41 AM	Welcoming	Warm	Culturally rich
3	May 19, 2009 8:27 AM	Exotic	Welcoming	Scenic
4	May 22, 2009 8:12 AM	Surprising	Developing	Rich history and Culture
5	Jun 3, 2009 8:35 AM	No feedback		
6	Jun 3, 2009 8:46 AM	No feedback		
7	Jun 3, 2009 8:55 AM	No feedback		
8	Jun 3, 2009 9:11 AM	Impressive	Breathtaking	Steep
9	Jun 4, 2009 9:04 AM	Welcome		
10	Jun 4, 2009 2:08 PM	No feedback		

Note: 2 responses were not understandable

Question 15

What three words would you use to describe Armenia to potential tourists (if different to the above)?		
Answer Options	Response Percent	Response Count
1.	91.7%	11
2.	91.7%	11
3.	58.3%	7
<b>answered question</b>		<b>12</b>
<b>skipped question</b>		<b>11</b>

No	Response Date	1.	2.	3.
1	May 18, 2009 11:22 AM	Not a tourist country	Very good food	
2	May 19, 2009 7:41 AM	Welcoming	Francophile	Diversified
3	May 19, 2009 8:27 AM	Cultural	Warm	Offbeat
4	May 22, 2009 8:12 AM	Rapidly developing	Rich heritage in History, cultural and Religious	With a varied cuisine and very tasty
5	Jun 3, 2009 8:35 AM	Novelty	Mountain	
6	Jun 3, 2009 8:46 AM	Cultural	Nature	Customs and traditions
7	Jun 3, 2009 8:55 AM	Off the beaten	Nature	Culture
8	Jun 3, 2009 9:11 AM	Monasteries	Mystic / Imprint past	Cultural and natural wealth
9	Jun 4, 2009 9:04 AM	Welcome	Culture	Landscapes
10	Jun 4, 2009 2:08 PM	Nature	Culture	

Note: 2 responses were not understandable

## Question 16

What do you believe are Armenia's unique selling points - please list in order of preference?		
Answer Options	Response Percent	Response Count
1.	91.7%	11
2.	58.3%	7
3.	25.0%	3
<b>answered question</b>		<b>12</b>
<b>skipped question</b>		<b>11</b>

Nº	Response Date	1.	2.	3.
1	May 18, 2009 11:22 AM	I to not understand the question		
2	May 19, 2009 7:41 AM	Agencies	Direct	
3	May 19, 2009 8:27 AM	Sevan	Tatev	Gerhart
4	May 22, 2009 8:12 AM	Not understand the question		
5	Jun 3, 2009 8:35 AM	Yerevan	Tatev	
6	Jun 3, 2009 8:46 AM	Garni Temple	Sevan	Monastery Aghbat
7	Jun 3, 2009 8:55 AM	I do not know		
8	Jun 3, 2009 9:11 AM	Echmiatsin	Khor Virap	Geghart
9	Jun 4, 2009 9:04 AM	Monasteries	Landscapes	
10	Jun 4, 2009 2:08 PM	Geghart		

Note: 2 responses were not understandable

## Question 17

What do they think would be a good 'tag line' for promoting Armenia?	
Answer Options	Response Count
	12
<b>answered question</b>	<b>12</b>
<b>skipped question</b>	<b>11</b>

Nº	Response Date	Response Text
1	May 18, 2009 11:22 AM	Cradle of Christianity
2	May 19, 2009 7:41 AM	Armenia: more diverse than you would have thought!
3	May 19, 2009 8:27 AM	Armenia, the friendly country
4	May 22, 2009 8:12 AM	Armenia ... Oh Yes!
5	Jun 3, 2009 8:35 AM	I do not know

6	Jun 3, 2009 8:46 AM	Art and Splendor of Armenia
7	Jun 3, 2009 8:55 AM	Nature and Culture
8	Jun 3, 2009 9:11 AM	Ancient culture
9	Jun 4, 2009 9:04 AM	land of hospitality and culture
10	Jun 4, 2009 2:08 PM	I do not know

Note: 2 responses were not understandable

Question 18

What other countries, perhaps offering similar experiences, do your clients also consider visiting?		
Answer Options	Response Percent	Response Count
1.	83.3%	10
2.	50.0%	6
3.	8.3%	1
<b>answered question</b>		<b>12</b>
<b>skipped question</b>		<b>11</b>

No	Response Date	1.	2.	3.
1	May 18, 2009 11:22 AM	I to not understand the question???		
2	May 19, 2009 7:41 AM	Georgia	Uzbekistan	
3	May 19, 2009 8:27 AM	Uzbekistan	Mongolia	Georgia
4	May 22, 2009 8:12 AM	Georgia		
5	Jun 3, 2009 8:35 AM	Uzbekistan		
6	Jun 3, 2009 8:46 AM	Uzbekistan		
7	Jun 3, 2009 8:55 AM	Albania	Macedonia	
8	Jun 3, 2009 9:11 AM	Georgia		
9	Jun 4, 2009 9:04 AM	Jordan	Syria	
10	Jun 4, 2009 2:08 PM	Turkey		

Note: 2 responses were not understandable

Question 19

Compared to these countries, do you believe Armenia's visitor experience is:		
Answer Options	Response Percent	Response Count
Better	25.0%	3
About the same	58.3%	7
Worse	16.7%	2
<b>answered question</b>		<b>12</b>
<b>skipped question</b>		<b>11</b>

Question 20

Compared to these countries, do you believe costs in Armenia are:		
Answer Options	Response Percent	Response Count
More expensive	75.0%	9
About the same	25.0%	3
Cheaper	0.0%	0
<b>answered question</b>		<b>12</b>
<b>skipped question</b>		<b>11</b>

Question 21

Since you started offering trips to Armenia, would you say that interest amongst your clients toward Armenia trips has:		
Answer Options	Response Percent	Response Count
Increased	58.3%	7
Stayed the same	33.3%	4
Decreased	8.3%	1
<b>answered question</b>		<b>12</b>
<b>skipped question</b>		<b>11</b>

Question 22

When considering Armenia, what questions do your potential tourists specifically ask or what concerns do they express?				
Answer Options	Response Percent	Response Count		
1.	91.7%	11		
2.	33.3%	4		
3.	8.3%	1		
<b>answered question</b>		<b>12</b>		
<b>skipped question</b>		<b>11</b>		
No	Response Date	1.	2.	3.
1	May 18, 2009 11:22 AM	Closure of borders with neighboring countries		
2	May 19, 2009 7:41 AM	There's only there to see the monasteries?	Is it cold?	
3	May 19, 2009 8:27 AM	Security	Food	Language
4	May 22, 2009 8:12 AM	The areas bordering Azerbaijan	The hardness of the Quai d'Orsay preventing promote properly combined	
5	Jun 3, 2009 8:35 AM	I do not know		
6	Jun 3, 2009 8:46 AM	I do not know		
7	Jun 3, 2009 8:55 AM	I do not know		
8	Jun 3, 2009 9:11 AM	What has he to do?		
11	Jun 4, 2009 9:04 AM	No		
12	Jun 4, 2009 2:08 PM	Does the risk of insecurity?		

Note: 2 responses were not understandable

## Section 2: TOs not offering trips to Armenia

### Question 23

Have you, or has anyone you know, ever visited Armenia?		
Answer Options	Response Percent	Response Count
Yes	100.0%	3
No	0.0%	0
<b>answered question</b>		<b>3</b>
<b>skipped question</b>		<b>1</b>

### Question 24

Has your company previously offered trips to Armenia?		
Answer Options	Response Percent	Response Count
Yes	66.7%	2
No	33.3%	1
<b>answered question</b>		<b>3</b>
<b>skipped question</b>		<b>1</b>

### Question 25

If yes, what was the main reason to stop the trips?		
Answer Options	Response Percent	Response Count
Unreliable local partner	0.0%	0
No interest or demand from clientele	50.0%	1
Too expensive for clients	0.0%	0
Armenia too difficult to get to	0.0%	0
Clients not satisfied with the destination and experience	0.0%	0
Other (please specify)	50.0%	1
<b>answered question</b>		<b>2</b>
<b>skipped question</b>		<b>2</b>

No	Response Date	Other (please specify)
1	May 18, 2009 10:04 AM	We do not know very well the country then we do not sell yet

## Question 26

Why are you currently not organizing tours to Armenia? (Please select <u>all</u> that apply)		
Answer Options	Response Percent	Response Count
Lack of information on the destination	100.0%	2
Insufficient promotion of Armenia in international media	0.0%	0
No contacts with regional/local tour operators	50.0%	1
No interest from clientele	0.0%	0
Too expensive	0.0%	0
Too difficult to get to	50.0%	1
Doesn't fit with current portfolio of itineraries or types of	0.0%	0
Other (please specify)		0
<b>answered question</b>		<b>2</b>
<b>Skipped question</b>		<b>2</b>

## Question 27

Would you be interested in visiting or establishing tours to Armenia?		
Answer Options	Response Percent	Response Count
Yes	100.0%	2
No	0.0%	0
<b>answered question</b>		<b>2</b>
<b>skipped question</b>		<b>2</b>

## Question 28

In your opinion, what are the three most popular traits that characterize Armenians or the Armenian nation?			
Answer Options	Response Percent	Response Count	
1.	100.0%	2	
2.	100.0%	2	
3.	50.0%	1	
<b>answered question</b>			<b>2</b>
<b>skipped question</b>			<b>2</b>

No	Response Date	1.	2.	3.
1	May 18, 2009 1:19 PM	Beautiful nature and landscapes	Many cultural sites (mainly religious)	Very good food
2	Jun 3, 2009 11:26 AM	Poverty	Noise, smell	

## Question 29

Please use up to five words or short phrases to describe your perception of Armenia as a tourism destination?

Answer Options	Response Percent	Response Count
1.	100.0%	2
2.	50.0%	1
3.	50.0%	1
4.	50.0%	1
5.	0.0%	0
<b>answered question</b>		<b>2</b>
<b>skipped question</b>		<b>2</b>

No	Response Date	1.	2.	3.	4.	5.
1	May 18, 2009 1:19 PM	Beautiful heritage	Scenery	Limited infrastructure (few hotels except Yerevan)	Diplomatic ties with neighboring difficult (and turkey azrbaidjan)	
2	Jun 3, 2009 11:26 AM	Not				

## Question 30

Please select words (more than one are applicable) that in your opinion describe Armenia today.

Answer Options	Response Percent	Response Count
Hospitable	100.0%	2
Modern	50.0%	1
Authentic	50.0%	1
Unsafe	50.0%	1
Asian	0.0%	0
Adventurous	0.0%	0
Familiar	0.0%	0
Developed	0.0%	0
Difficult to access	0.0%	0
Landlocked	50.0%	1
Muslim/Islamic	0.0%	0
Dirty/unclean	0.0%	0
Politically insecure	0.0%	0
Western-oriented	0.0%	0
Not very welcoming	0.0%	0
Ancient	100.0%	2
Pretentious	0.0%	0
Safe	100.0%	2
European	0.0%	0
Passive	0.0%	0
Unknown	0.0%	0
Backward / Developing	50.0%	1
Very accessible	50.0%	1

<b>Please select words (more than one are applicable) that in your opinion describe Armenia today.</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
With coastline	0.0%	0
Christian	50.0%	1
Clean country	0.0%	0
Politically stable	0.0%	0
Soviet	0.0%	0
Other (please specify)		0
<b>answered question</b>		<b>2</b>
<b>skipped question</b>		<b>2</b>

### Question 31

<b>In your opinion what kind of tourism products are available in Armenia? (Please select all that apply)</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Sun & beach	50.0%	1
Cultural/Historical	100.0%	2
Nature	100.0%	2
Water sports (canoeing, rafting, surfing)	0.0%	0
Cycling	50.0%	1
Spa/Hot Springs	0.0%	0
Multi - Adventure tours	50.0%	1
Religious/Pilgrimage	0.0%	0
Winter sports/skiing holiday	0.0%	0
Bird watching	0.0%	0
Wellness	0.0%	0
Medical treatment	0.0%	0
Agrotourism	0.0%	0
Archaeology	0.0%	0
B&B	0.0%	0
Backpacking	50.0%	1
Caving	0.0%	0
Culinary/Gastronomy	0.0%	0
Ecotourism	50.0%	1
Horse riding	0.0%	0
Golf	0.0%	0
Fishing	0.0%	0
Hunting	0.0%	0
Rock Climbing	0.0%	0
Photography	50.0%	1
Shopping	0.0%	0
Volunteer Tourism	0.0%	0
<b>answered question</b>		<b>2</b>
<b>skipped question</b>		<b>2</b>

## Question 32

Please indicate your degree of perceived agreement/disagreement with the following statements. Armenians are:

Answer Options	Strongly agree	Agree	Don't know	Disagree	Strongly disagree	Rating Average	Response Count
Creative & innovative	1	1	0	0	0	1.50	2
Individualistic	0	1	0	1	0	3.00	2
Culturally distinctive	1	1	0	0	0	1.50	2
Hardworking and industrious	0	2	0	0	0	2.00	2
Respectful of others	0	2	0	0	0	2.00	2
Family-oriented and have strong Christian morals	0	2	0	0	0	2.00	2
Humorous and optimistic	1	0	1	0	0	2.00	2
Honest and trustworthy	0	2	0	0	0	2.00	2
Charitable	0	1	1	0	0	2.50	2
Hospitable and friendly	0	1	1	0	0	2.50	2
<b>answered question</b>							<b>2</b>
<b>skipped question</b>							<b>2</b>

## Question 33

Please list other countries that you believe offer similar tourist attractions and products.

Answer Options	Response Percent	Response Count
1.	100.0%	2
2.	50.0%	1
3.	0.0%	0
<b>answered question</b>		<b>2</b>
<b>skipped question</b>		<b>2</b>

No	Response Date	1.	2.	3.
1	May 18, 2009 1:19 PM	Yemen		
2	Jun 3, 2009 11:26 AM	The Armenia	Stat of the Country"	

Question 34

For how many years have you been in operation?		
Answer Options	Response Percent	Response Count
1-5	0.0%	0
6-10	0.0%	0
11-15	100.0%	1
16+	0.0%	0
<b>answered question</b>		<b>1</b>
<b>skipped question</b>		<b>3</b>

Question 35

What are your three most popular destinations?		
Answer Options	Response Percent	Response Count
1.	100.0%	1
2.	94.3%	1
3.	94.3%	0
<b>answered question</b>		<b>1</b>
<b>skipped question</b>		<b>3</b>

No	Response Date	1.	2.	3.
1	May 18, 2009 1:20 PM	Sultanate of Oman	Ethiopia	

Question 36

Please provide us with the town and country where your company is located		
Answer Options	Response Percent	Response Count
Afghanistan	3.8%	1
Anguilla	3.8%	1
France	42.3%	11
Other	50.0%	13
<b>answered question</b>		<b>13</b>
<b>skipped question</b>		<b>14</b>

No	Response Date	City
1	May 18, 2009 11:23 AM	Paris
2	May 18, 2009 1:21 PM	Paris
3	May 19, 2009 7:42 AM	Mulhouse
4	May 19, 2009 8:28 AM	Paris

Nº	Response Date	City
5	May 22, 2009 8:13 AM	Paris
6	Jun 3, 2009 8:38 AM	Paris
7	Jun 3, 2009 8:49 AM	Pont de Buis
8	Jun 3, 2009 8:57 AM	Gerardmer
9	Jun 3, 2009 9:13 AM	Paris
10	Jun 4, 2009 9:05 AM	Paris
11	Jun 4, 2009 2:11 PM	Paris

Note: 2 responses were not understandable

### Question 37

If you would like to receive further information from the Armenian Tourism Development Agency, please provide additional contact details below:

*answered question* 11

*skipped question* 16

Nº	Response Date	Name:	Company:	Website:	Email Address:
1	May 18, 2009 1:21 PM	Emmanuelle Andreau	Sindbad voyages	<a href="http://www.sindbad-voyages.com">www.sindbad-voyages.com</a>	<a href="mailto:infos@sindbad-voyages.com">infos@sindbad-voyages.com</a>
2	May 19, 2009 7:42 AM	Greff Julie	Starter	<a href="http://www.voyages-starter.com">www.voyages-starter.com</a>	<a href="mailto:julie.greff@voyages-starter.com">julie.greff@voyages-starter.com</a>
3	May 22, 2009 8:13 AM	Semra Beyazkilic	INTERMEDES	<a href="http://www.intermedes.com">www.intermedes.com</a>	<a href="mailto:sbeyazkilic@intermedes.com">sbeyazkilic@intermedes.com</a>
4	Jun 3, 2009 8:38 AM	M. Jean	Amslav	<a href="http://www.amslav.fr">www.amslav.fr</a>	<a href="mailto:djean@amslav.com">djean@amslav.com</a>
5	Jun 3, 2009 8:49 AM	Ms. Briand	Pouchkine Tours	<a href="http://www.pouchkine-tours.com">www.pouchkine-tours.com</a>	<a href="mailto:charlene.briand@pouchkine-tours.com">charlene.briand@pouchkine-tours.com</a>
6	Jun 3, 2009 8:57 AM	Ms. Briand	Montagne Evasion	<a href="http://www.montagne-evasion.com">www.montagne-evasion.com</a>	<a href="mailto:production@montagne-evasion.com">production@montagne-evasion.com</a>
7	Jun 3, 2009 9:13 AM	Mr. Ferhat	Osmoz	<a href="http://www.osmozvoyages.com">www.osmozvoyages.com</a>	<a href="mailto:sadiferhat@osmozvoyages.fr">sadiferhat@osmozvoyages.fr</a>
8	Jun 4, 2009 9:05 AM	Sévi Gwen	STI Voyages	<a href="http://www.stivoyages.com">www.stivoyages.com</a>	<a href="mailto:gwen@stivoyages.com">gwen@stivoyages.com</a>
9	Jun 4, 2009 2:11 PM	Mr. Laprevotte	Zig Zag	<a href="http://www.zigzag-randonnees.com">www.zigzag-randonnees.com</a>	<a href="mailto:thierry@zigzag-randonnees.com">thierry@zigzag-randonnees.com</a>

Note: 2 responses were not understandable



Republic of Armenia  
0002 Yerevan, 26/3 Sarian str.  
Tel.: + (374 10) 500 612, 500 613, 500 614  
E-mail: [office@caps.am](mailto:office@caps.am)  
Website: [www.caps.am](http://www.caps.am)