



USAID
FROM THE AMERICAN PEOPLE

RUSSIAN 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.

RUSSIAN 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

1. OBJECTIVES OF THE FOREIGN TOUR OPERATORS' SURVEY	4
1.1. TOs FROM RUSSIA.....	4
1.1.1. <i>Russia TOs Profile</i>	<i>4</i>
1.1.2. <i>Russia TOs Not Offering Tours to Armenia.....</i>	<i>5</i>
1.1.3. <i>Interest from Russian TOs about Armenia</i>	<i>5</i>
1.1.4. <i>Russian TOs about Most Popular Traits Characterizing Armenia and Armenian Nation</i>	<i>5</i>
1.1.5. <i>Russia TOs about Countries Similar to Armenia</i>	<i>9</i>
1.1.6. <i>SWOT for Armenia Tourism in Russian Market</i>	<i>9</i>
ANNEX 1. RUSSIAN TOUR OPERATOR'S SURVEY REPORTING TABLES.....	11
SECTION 1: TOs CURRENTLY ORGANIZING TOURS TO ARMENIA	11
SECTION 2: TOs NOT OFFERING TRIPS TO ARMENIA	20

1. OBJECTIVES OF THE FOREIGN TOUR OPERATORS' SURVEY

This Survey of Russian Tour Operators can assist the Armenian tourism industry in improving the promotion and perception of Armenia as a tourism destination in the Russian 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 the 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
- Identify the positive and negative images of Armenia and Armenian nation

1.1. TOs FROM RUSSIA

A total of 311 foreign tour operators (FTOs) participated in the survey. The survey was distributed in 4 languages: English, French, Italian, and Russian. 23% of the FTOs (72 tour operators) answered the survey in Russian (See Annex 1 for details).

1.1.1. Russia TOs Profile

Six of the 72 respondents indicated that they were currently organizing tours to Armenia. Therefore, 66 were not offering tours to Armenia, but were considering Armenia as opportunity.

Table 1: Number of years of operation of Russian tour operators

Years/Russian TOs	Russian TOs offering tours to Armenia	Russian TOs not offering tours to Armenia	Total	Response Percent
1-5	0	9	9	23.1%
6-10	2	12	14	35.9%
11-15	2	10	12	30.8%
16+	0	4	4	10.3%

Russian TOs' most popular markets are: Russia, Turkey and Europe; Russians like to travel to those destinations.

Very few (6) Russian TOs organizing tours to Armenia participated in the survey and even fewer (4) 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 1.

1.1.2. *Russia TOs Not Offering Tours to Armenia*

The results summarized below represent answers from the 66 Russian TOs, not currently offering tours to Armenia. Detailed answers are in Annex 1: Russia FTO Survey Tables.

1.1.3. *Interest from Russian TOs about Armenia*

- Russian TOs mentioned that the number one problem they face in organizing tours to Armenia is the lack of information. Armenia is now relatively unknown as a tourism destination, has a relatively inactive tourism industry and is insufficiently promoted in Russian market. Russian TOs have no contacts with local/regional tour operators.
- 54.3% mentioned that there was no interest from their clients in Armenia. This is likely due to the lack of the information and insufficient promotion indicated above.
- However, an interest towards Armenia is still apparent and 74.3% of the TOs are interested in establishing tours to Armenia. Emotional comments like “something from childhood”, suggests that the TOs have nostalgic memories of Armenia

1.1.4. *Russian TOs about Most Popular Traits Characterizing Armenia and Armenian Nation*

- 1) **The most popular traits characterizing Armenia and the Armenian nation** are described in Table 2.
 - a. It is quite clear that the most popular traits suggested, such as Hospitality, Friendliness, and Respecting Family and Traditions, correspond to feelings Armenians have about themselves.
 - b. Negative responses were rare, therefore indicating a relatively positive image of the Armenian nation. However, it is obvious that individual experiences have lead to some negative conclusions.

Table 2: Traits Characterizing Armenia and Armenian Nation by Popularity

Popular responses	Infrequent response	Rare responses
5-20 responses each	2-5 responses each	1 response each
Hospitable	Cheerful	Positive
Friendly	Cunning	Kindness
Respecting family and traditions	Beautiful	Wisdom
	Christian	Goodwill
	Sense of humor	Openness
	Musical	Wide soul
	Ancient culture	High culture
		Hidden elegance
		Original
		Hard workers

Popular responses	Infrequent response	Rare responses
5-20 responses each	2-5 responses each	1 response each
		Magnanimity
		Decency
		Good will
		Beautiful singing
		Exotic (for northern people) beauty
		Knowing how much to drink
		Adaptability
		Love of national cuisine
		Sympathy for their past and present
		New
		Secure
		Clean country
		Nature
		Diverse kitchen
		Greedy
		Hot character
		Irascible
		Harmful
		Loud
		Unreliable
		Noisy
		Merchants
		Not good workers
		Proud
		Talkative
		Boasting

- 2) **Words or short phrases describing Armenia as a tourism destination** (see Table 3).
 - a. Phrases like “Unknown destination” and “Lack of information” again prevailed in the responses. This appears to be a major problem in Russia.

- b. Some responses emphasize the fact that they have little idea what Armenia has to offer as a tourism destination and expressed a wish to have the chance to visit and learn.
- c. Where tour products were given as responses to the question on Armenia as a destination, such responses provide an opportunity to tour companies to consider developing such products: intensive tours, adventure, excursions, and active vacations, celebratory and eventful tourism. There may be a certain advantage in developing products that already resonate with the perceptions of the market.

Table 3: Popular Words and Phrases Describing Armenia as Tourism Destination

Popular responses	Infrequent response	Rare responses
5-15 responses each	2-5 responses each	1 response each
Unknown destination	New, novelty destination	Echmiadzin
Rich and ancient history and customs	Spirituality, religious (churches)	Contemporary design of cities
Lack of information	Sunny	No language barrier
Rich culture, arts and architecture	Beautiful	Ecologically clean
Nature	Exotic	Informative
Cuisine (cognac, fruits, lavash)	Yerevan	Known
Mountains	Sevan	Individual
Interesting	A lot of sightseeing	There are options for intensive tours
Hospitable		Traditions toward family: fathers and children
		Cheap gold and very good quality golden jewelry
		Something from childhood
		Pleasant acquaintance
		Peaceful
		Adventure
		Djigarkhanyan ¹
		Easily reachable
		I wish to see
		Clean country
		Un-ostentatious
		Close

¹ Armen Djigarkhanyan is Armenian famous actor, always lived in Russia.

Popular responses	Infrequent response	Rare responses
5-15 responses each	2-5 responses each	1 response each
		Fun
		Celebratory
		Specific
		Excursions
		Active vacation
		Event tourism
		Eastern
		Doubt
		Far away
		Not enough developed infrastructure with other destinations
		Tourism service is not developed'
		'Unsafe
		Difficult
		Unprofitable
		Need of high level service
		Not interesting to clients
		Not interesting to agents
		It is not interesting to look at ruins

3) Russian TOs provided their opinions on how Armenia can be described today:

- a. Hospitable, ancient and Christian prevail most of all, again matching with how Armenians perceive themselves. Therefore, these traits would be good to highlight in promotion of the country.
- b. Some answers are contradictory: such as is it safe (20%) and unsafe (8.6%); Asian (14.3%) and European (8.6%); difficult to access (22.9%) and very accessible (14.3%)? The contradiction between landlocked (14.4%) and coastal (8.6%) shows a serious lack of information and mixed perceptions.
- c. 25.7% mentioned that Armenia is backward in its development!
- d. The indication that Armenia is "Unknown" is also a concern. It is more unknown (28.6%) than familiar (8.6%), despite being for 70 years in the same Union with Russia.

4) Russian TOs' opinion about Armenia's tour products:

Armenia's tour products were described by Russian tour operators quite widely. However, the conclusions below represent the views of more than 40% of the TOs. Some interesting facts are also highlighted.

- a. They see Armenia's tour products predominantly focusing on **Culture/History** (82.9%). However, among similar products they also highlight the country's archeology (48.6%)
- b. **Nature** (74.3%) is perceived as another important tour product for Armenia. Eco-tourism (40%) and backpacking (40%) are perceived to be Armenia's tour products as well.
- c. The suggestion of **Photography** (45.7%) indicates an opinion that Armenia has picturesque landscapes, good sightseeing and can be a good location for photography
- d. **Culinary/Gastronomy** (42.9%) received high votes too.
- e. **Wellness** was listed by 40% of respondents; perhaps those with some nostalgia of the sanatoriums and spa towns.

It is worth mentioning some controversial facts:

- f. Strangely, some people thought Armenia has good **sun & beaches** (17.1%). They are perhaps reflecting on Sevan as a destination.
 - g. **Religious/pilgrimage** (31.4%) didn't receive a high response, despite Christianity being mentioned as a characteristic of the country today. This suggests that faith-based vacations and pilgrimages are yet to be dominant products in the Russian market.
 - h. Spa/water springs (34.3%) were mentioned; again perhaps referring to the spa towns (such as Jermuk) and sanatoriums.
- 5) According to 19 strongly agreed responses, Armenians are **Family-oriented and have strong Christian morals**. They are **Respectful to others, Humorous & optimistic and Hospitable & friendly**.

1.1.5. *Russia TOs about Countries Similar to Armenia*

79 responses from Russian TOs highlighted the countries that they believe have similar tourist attractions and products to Armenia. The top three countries were listed as follows:

- a) **Georgia**
- b) **Russia**
- c) **Azerbaijan**
- d) **Turkey**

1.1.6. *SWOT for Armenia Tourism in Russian Market*

STRENGTHS (positive perception)	WEAKNESSESS (negative perceptions)
<ul style="list-style-type: none"> 1) Even though no conclusions can be drawn, the three Russian tour operators, who are doing business in Armenia, have been organizing tours since 2005. Two of them have repeat clients and are absolutely satisfied with their Armenian partner 2) The tendency in offering tours to Armenia hasn't decreased; it has increased or stayed the same 3) Interest in offering tours to Armenia is high 4) The image of Armenia is, to a great extent positive 5) The opinions of the majority TOs about Armenia's tour products largely corresponds to reality and to what Armenians also think of themselves; Cultural/historical, Nature, Archeology 6) Russian TOs see Armenia as a potential market for their tourists 7) There are no language barriers. Old and pleasant acquaintances can be renewed. 	<ul style="list-style-type: none"> 1) Armenia is unknown to the Russian market 2) Armenia's tourism industry is inactive, Armenia is not advertised and there is a lack of information about the country 3) Price is a barrier. Armenia is mentioned as unprofitable and over-priced 4) Because of the lack of information, misperceptions exist, such as: <ul style="list-style-type: none"> a) Armenia is difficult to access b) Armenia is unsafe The country has too many ruins

OPPORTUNITIES	THREATS
<ol style="list-style-type: none">1) Russia is a growing market.2) It is close to Armenia, with 2 Russian and national airlines flying directly.3) Armenia used to be a familiar destination during Soviet days and with almost no language barrier it will be easy to renew the connections4) Positive perceptions and old memories can be used in promotional actions and materials5) Armenian TOs organize familiarization tours or NCFA organizes educational seminars for TOs interested in coming to Armenia6) Surveys of this type should be done after implementation of activities to find new ideas and discover new opportunities	<ol style="list-style-type: none">1) No actions taken by NCFA2) No actions taken by Armenian TOs3) Other destinations more active in their promotion to the Russia4) Political conflicts with Georgia5) Terrorism in Russia towards Caucasian people

ANNEX 1. Russian 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	8.3%	6
Considering to offer trips to Armenia	91.7%	66
	answered question	72
	skipped question	0

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	50.0%	2
Word of Mouth	25.0%	1
Through a familiarization tour	25.0%	1
Advertisement in consumer or travel trade magazine	0.0%	0
At a Tourism/Travel Exhibition	25.0%	1
Introduction through the Armenian Tourism Development Agency	0.0%	0
Internet Search	50.0%	2
Other (please specify)	25.0%	1
	answered question	4
	skipped question	2

Number	Response Date	Other (please specify)
1	Sep 11, 2009 1:02 PM	Friends

Question 3

For how many years have you been in operation?		
Answer Options	Response Percent	Response Count
1-5	0.0%	0
6-10	50.0%	2
11-15	50.0%	2
16+	0.0%	0
answered question		4
skipped question		2

Question 4

How long have you been offering tours to Armenia?		
Answer Options	Response Percent	Response Count
First tour undertaken in 2008	25.0%	1
Since 2007	0.0%	0
Since 2006	0.0%	0
Since 2005	0.0%	0
Prior to 2005	75.0%	3
answered question		4
skipped question		2

Question 5

How many scheduled departures did you have for trips in 2008 that included Armenia?		
Answer Options	Response Percent	Response Count
1-3	50.0%	2
4-6	0.0%	0
7-9	0.0%	0
10+	50.0%	2
answered question		4
skipped question		2

Question 6

Do you have repeat clients to Armenia?		
Answer Options	Response Percent	Response Count
Yes	50.0%	2
No	50.0%	2
<i>answered question</i>		4
<i>skipped question</i>		2

Question 7

Do your tours to Armenia include other neighboring countries?		
Answer Options	Response Percent	Response Count
Just Armenia	25.0%	1
Armenia & neighboring countries (including Karabagh)	25.0%	1
More than one type of trip provided (some of them just to Armenia, some regional)	50.0%	2
<i>answered question</i>		4
<i>skipped question</i>		2

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	100.0%	2
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	0.0%	0
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.	0.0%	0
Please elaborate on your answer, if appropriate		0
<i>answered question</i>		2
<i>skipped question</i>		4

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	0.0%	0
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.	100.0%	2
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	0.0%	0
Very poor and generates significant complaints. We simply have to find somewhere else to put our clients.	0.0%	0
Is very mixed in the quality of facilities and services provided and cannot be easily categorized into one of the choices above.	0.0%	0
Please elaborate, if applicable		0
answered question		2
skipped question		4

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)	50.0%	1
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)	50.0%	1
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.	0.0%	0
Vary in the quality of the facilities, information and service provided. Some are great while others are really poor.	0.0%	0
Please, if necessary, provide with more detailed answer		0

<i>answered question</i>	2
<i>skipped question</i>	4

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.	0.0%	0
Be overpriced. The facilities and services are generally good but not worth the costs that are being charged.	100.0%	2
Offer poor value for money. Facilities and services are poor and ridiculously priced.	0.0%	0
Please give more detailed answer, if necessary.		1
<i>answered question</i>		2
<i>skipped question</i>		4

No	Response Date	Please give more detailed answer, if necessary
1	Sep 11, 2009 1:04 PM	Flight tickets are expensive

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%	2
2.	100.0%	2
3.	0.0%	0
<i>answered question</i>		2
<i>skipped question</i>		4

No	Response Date	1.	2
1	May 19, 2009 10:01 AM	High hotel prices	Breakfasts are very bad
2	Sep 11, 2009 1:04 PM	Food (Tsakhkadzor)	Expensive flights

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 Count
1.	100.0%	2
2.	0.0%	0
3.	0.0%	0
answered question		2
skipped question		4

No	Response Date	1.
1	May 19, 2009 10:01 AM	High prices in hotels
2	Sep 11, 2009 1:04 PM	Personnel service quality

Question 14

What words do tourists use to describe Armenia once they have returned?		
Answer Options	Response Percent	Response Count
1.	100.0%	2
2.	50.0%	1
3.	50.0%	1
answered question		2
skipped question		4

No	Response Date	1.	2.	3.
1	May 19, 2009 10:05 AM	Wonderful	Beautiful	Warm welcome

Note: Second response was 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.	100.0%	2
2.	50.0%	1

3.	0.0%	0
answered question		2
skipped question		4

No	Response Date	1.	2.
1	May 19, 2009 10:05 AM	Secure	There are things to see

Note: Second response was 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.	100.0%	2
2.	50.0%	1
3.	0.0%	0
answered question		2
skipped question		4

No	Response Date	1.	2.
1	May 19, 2009 10:05 AM	History	
2	Sep 11, 2009 1:05 PM	Cultural values	Sport opportunities

Question 17

What do they think would be a good 'tag line' for promoting Armenia?		
Answer Options	Response Count	
	2	
answered question		2
skipped question		4

No	Response Date	Response Text
1	May 19, 2009 10:05 AM	We haven't decided yet

Note: Second response was not understandable

Question 18

What other countries, perhaps offering similar experiences, do your clients also consider visiting?		
Answer Options	Response Percent	Response Count
1.	100.0%	2
2.	100.0%	2
3.	0.0%	0
answered question		2
skipped question		4

No	Response Date	1.	2.
1	May 19, 2009 10:05 AM	Georgia	Azerbaijan
2	Sep 11, 2009 1:05 PM	Uzbekistan	Kirgizia

Question 19

Compared to these countries, do you believe Armenia's visitor experience is:		
Answer Options	Response Percent	Response Count
Better	50.0%	1
About the same	50.0%	1
Worse	0.0%	0
answered question		2
skipped question		4

Question 20

Compared to these countries, do you believe costs in Armenia are:		
Answer Options	Response Percent	Response Count
More expensive	0.0%	0
About the same	100.0%	2
Cheaper	0.0%	0
answered question		2
skipped question		4

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	50.0%	1
Stayed the same	50.0%	1
Decreased	0.0%	0
answered question		2
skipped question		4

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.	100.0%	2
2.	0.0%	0
3.	0.0%	0
answered question		2
skipped question		4

No	Response Date	1.
1	May 19, 2009 10:05 AM	Whether it is safe or not?

Note: Second response was 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	54.0%	34
No	46.0%	29
answered question		63
skipped question		3

Question 24

Has your company previously offered trips to Armenia?		
Answer Options	Response Percent	Response Count
Yes	6.3%	4
No	93.7%	59
answered question		63
skipped question		3

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	75.0%	3
Too expensive for clients	25.0%	1
Armenia too difficult to get to	0.0%	0
Clients not satisfied with the destination and experience	0.0%	0
Other (please specify)	0.0%	0
answered question		4
skipped question		62

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	57.1%	20
Insufficient promotion of Armenia in international media	31.4%	11
No contacts with regional/local tour operators	51.4%	18
No interest from clientele	54.3%	19
Too expensive	0.0%	0
Too difficult to get to	11.4%	4
Doesn't fit with current portfolio of itineraries or types of tour we offer	22.9%	8
Other (please specify)		3
answered question		35
skipped question		31
No	Response Date	Other (please specify)
1	Jul 20, 2009 6:41 AM	We do business tourism - exhibitions; there are very few authority big forums held in Armenia (unfortunately)
2	Jul 24, 2009 12:27 PM	We organize tours only by clientele request
3	Aug 25, 2009 11:19 AM	We are business travel agency and don't offer tours. Our clients fly to Yerevan due to business. Armenia also interests us as MICE destination.

Question 27

Would you be interested in visiting or establishing tours to Armenia?		
Answer Options	Response Percent	Response Count
Yes	74.3%	26
No	25.7%	9
answered question		35
skipped question		31

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%	35
2.	94.3%	33
3.	94.3%	33
answered question		35
skipped question		31

No	Response Date	1.	2.	3.
1	Jun 24, 2009 7:29 PM	No comments		
2	Jun 25, 2009 12:22 PM	Beauty	Religiousness	Hospitability
3	Jun 25, 2009 12:28 PM	Greedy	Harmful	Loud
4	Jun 26, 2009 10:20 AM	Beautiful	Hospitable	Ancient
5	Jun 26, 2009 10:54 AM	Cheerful	Hospitable	Melodious
6	Jun 28, 2009 7:52 PM	Hospitability	Love to family traditions	Diverse kitchen
7	Jul 2, 2009 8:49 AM	Hospitability	Friendly	Culture
8	Jul 2, 2009 10:33 AM	Cheerfulness	Reasonable cunning	Hidden elegance
9	Jul 9, 2009 7:06 AM	Goodwill	Hard workers	Help to relatives and compatriots
10	Jul 20, 2009 6:41 AM	Wide soul	Friendly	Beautiful singing
11	Jul 20, 2009 10:35 AM	I am from Sochi and this city for Armenians is second Native land	Friendly to Russians	Hospitability
12	Jul 21, 2009 7:15 AM	Cunning	Talkativeness	Boasting
13	Jul 22, 2009 12:23 PM	Hospitability	Original	Kindness
14	Jul 24, 2009 12:27 PM	Hospitable	Friendly	Cheerful
15	Jul 27, 2009 10:58 AM	Openness	Friendly	Positive
16	Jul 27, 2009 12:08 PM	Hospitability	Clean country	Friendly

№	Response Date	1.	2.	3.
17	Jul 27, 2009 1:29 PM	High culture	Hospitability	Exotic (for northern people) beauty
18	Jul 27, 2009 1:37 PM	I am not ready to answer		
19	Jul 27, 2009 3:18 PM	Hospitability	Magnanimity	Decency
20	Aug 8, 2009 8:45 AM	Hospitability	Honoring family traditions - respect to elderly and special altitude to children	Musicality
21	Aug 21, 2009 12:36 PM	Cunning	Enterprise	Adaptability
22	Aug 23, 2009 6:56 PM	Christianity	Ancient culture	Nature
23	Aug 24, 2009 9:54 AM	Hospitability	Sense of humor	Hot character
24	Aug 24, 2009 10:34 AM	There isn't	There isn't	There isn't
25	Aug 24, 2009 12:07 PM	Hospitability	Enterprise	Irascibility
26	Aug 25, 2009 11:19 AM	Wisdom	Love to children	Love to national cuisine
27	Aug 25, 2009 2:40 PM	Humor	Hospitability	Good will
28	Aug 26, 2009 8:21 AM	Hospitability	Respect to majors	Help each other in family and amongst friends
29	Sep 3, 2009 8:12 PM	Ease in dialogue	Hospitability	Unreliability
30	Sep 7, 2009 6:21 AM	Cheerful	Noisy	Knowing how much to Drink
31	Sep 8, 2009 8:18 AM	Friendly	Keeping and respecting traditions	Proudness
32	Sep 9, 2009 8:11 AM	"They put soft bed- but you sleep hard"	Traders (with slightly negative meaning)	Not good workers
33	Sep 18, 2009 7:51 AM	welcoming	Friendly	Hospitable
34	May 9, 2009 7:28 AM	Sympathy for their past and present	New	Security
35	Sep 18, 2009 7:51 AM	Welcoming	Friendly	Hospitable

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%	35
2.	94.3%	33
3.	88.6%	31
4.	80.0%	28
5.	71.4%	25
answered question		35
skipped question		31

No	Response Date	1.	2.	3.	4.	5.
1	Jun 24, 2009 7:29 PM	Yerevan	Sevan	Sun	Peaceful	Traditions toward family: fathers and children
2	Jun 25, 2009 12:22 PM	Historical	Spiritually rich	Beautiful	Picturesque	No language barrier
3	Jun 25, 2009 12:28 PM	Not interesting to clients	Not interesting to agents	There are no excursion guide-books	It is not interesting to look at ruins	
4	Jun 26, 2009 9:50 AM	-	-	-	-	-
5	Jun 26, 2009 10:20 AM	Pleasant acquaintance				
6	Jun 26, 2009 10:54 AM	Beautiful	Informative	Ecologically clean		
7	Jun 28, 2009 7:52 PM	Unknown	Architectural	Adventure	Hospitable	New
8	Jul 2, 2009 8:49 AM	Interesting	Unknown	Hospitable	etc.	etc.
9	Jul 2, 2009 10:33 AM	Echmiadzin	Ararat	Brandy (Cognac)	Nature	Local customs and history
10	Jul 9, 2009 7:06 AM	Unknown	Interesting	Sightseeing	Local customs and life style	Nature

№	Response Date	1.	2.	3.	4.	5.
11	Jul 20, 2009 6:41 AM	Unknown	Something from childhood	I wish to see	Ancient history	Coptic churches
12	Jul 20, 2009 10:35 AM	Exotic	Perspective	Cheap gold and very good quality golden jewelry	Sevan!!!	Cuisine!!!
13	Jul 21, 2009 7:15 AM	Unknown	Unadvertised (not PR-ed)			
14	Jul 22, 2009 12:23 PM	Inactive, few information	No link to tour operators	Novelty of destination		
15	Jul 24, 2009 12:27 PM	Interesting for Armenians living in other countries	There are options for intensive tours			
16	Jul 24, 2009 9:05 PM	-	-	-	-	-
17	Jul 27, 2009 10:58 AM	Always sunny	Bright colors	Fruits	Mountains	People
18	Jul 27, 2009 12:08 PM	Hospitable	Ancient	Clean country	Known	
19	Jul 27, 2009 1:29 PM	Ancient history	Traditional arts	Panoramic beauty	Unknown	
20	Jul 27, 2009 1:37 PM	New unknown				
21	Jul 27, 2009 3:18 PM	Warmness	Mountains	History	Architecture	Brandy (cognac)
22	Aug 8, 2009 8:45 AM	Historical tourism	Spa	Excursions	Active vacation	Eventful tourism
23	Aug 21, 2009 12:36 PM	Rich history	Unique ancient buildings	Mountains views	Temporary design of cities	A lot of sightseeing
24	Aug 23, 2009 6:56 PM	Culture	Nature	Religion	Mountains	Hospitable
25	Aug 24, 2009 9:54 AM	Country with rich cultural heritage	Eastern	Country with many century traditions	Religious	Mountainous

No	Response Date	1.	2.	3.	4.	5.
26	Aug 24, 2009 10:34 AM	There aren't	There aren't	There aren't	There aren't	There aren't
27	Aug 24, 2009 12:07 PM	Specific	Individual	Unknown	Similar	Interesting
28	Aug 25, 2009 11:19 AM	Unknown destination	Not widely advertised destination	-	-	-
29	Aug 25, 2009 2:40 PM	Close	Easily reachable	Fun/interesting	Sunny	Celebratory
30	Aug 26, 2009 8:21 AM	Mountains	Brandy (cognac)	Yerevan	Djigarkhanyan	Lavash
31	Sep 3, 2009 8:12 PM	Lack of information	Possible perspectives	Rich history	Unknown	Need of high level service
32	Sep 7, 2009 6:21 AM	Far away	Unknown	Unknown	Unprofitable	Unostentatious
33	Sep 8, 2009 8:18 AM	New	Exotic	Not enough developed infrastructure with other destinations	Tourism service is not developed	Lack of information in mass media
34	Sep 9, 2009 8:11 AM	Doubt	Interesting	Novel	Unsafe	Difficult
35	Sep 18,2009 7:51 AM	Less known	Little information	No information about tourist routes		

Question 30

Please select words (more than one are applicable) that in your opinion describe Armenia today.		
Answer Options	Response Percent	Response Count
Hospitable	74.3%	26
Modern	0.0%	0
Authentic	20.0%	7
Unsafe	8.6%	3
Asian	14.3%	5
Adventurous	14.3%	5

Please select words (more than one are applicable) that in your opinion describe Armenia today.		
Answer Options	Response Percent	Response Count
Familiar	8.6%	3
Developed	0.0%	0
Difficult to access	22.9%	8
Landlocked	14.3%	5
Muslim/Islamic	2.9%	1
Dirty/unclean	2.9%	1
Politically insecure	5.7%	2
Western-oriented	5.7%	2
Not very welcoming	2.9%	1
Ancient	51.4%	18
Pretentious	2.9%	1
Safe	20.0%	7
European	8.6%	3
Passive	5.7%	2
Unknown	28.6%	10
Backward / Developing	25.7%	9
Very accessible	14.3%	5
With coastline	8.6%	3
Christian	40.0%	14
Clean country	17.1%	6
Politically stable	17.1%	6
Soviet	17.1%	6
Other (please specify)		1
answered question		35
skipped question		31

Number	Response Date	Other (please specify)
1	Aug 23, 2009 6:56 PM	Beautiful

Question 31

In your opinion what kind of tourism products are available in Armenia? (Please select all that apply)		
Answer Options	Response Percent	Response Count
Sun & beach	17.1%	6
Cultural/Historical	82.9%	29
Nature	74.3%	26
Water sports (canoeing, rafting, surfing)	11.4%	4
Cycling	14.3%	5
Spa/Hot Springs	34.3%	12
Multi - Adventure tours	37.1%	13
Religious/Pilgrimage	31.4%	11
Winter sports/skiing holiday	20.0%	7
Bird watching	11.4%	4
Wellness	40.0%	14
Medical treatment	34.3%	12
Agrotourism	11.4%	4
Archaeology	48.6%	17
B&B	20.0%	7
Backpacking	40.0%	14
Caving	37.1%	13
Culinary/Gastronomy	42.9%	15
Ecotourism	40.0%	14
Horse riding	37.1%	13
Golf	2.9%	1
Fishing	14.3%	5
Hunting	14.3%	5

In your opinion what kind of tourism products are available in Armenia? (Please select all that apply)		
Answer Options	Response Percent	Response Count
Rock Climbing	22.9%	8
Photography	45.7%	16
Shopping	17.1%	6
Volunteer Tourism	5.7%	2
answered question		35
skipped question		31

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	5	15	13	2	0	2.34	35
Individualistic	4	15	8	8	0	2.57	35
Culturally distinctive	17	15	3	0	0	1.60	35
Hardworking and industrious	2	9	17	6	1	2.86	35
Respectful of others	7	18	6	3	1	2.23	35
Family-oriented and have strong Christian morals	19	14	2	0	0	1.51	35
Humorous and optimistic	13	18	4	0	0	1.74	35
Honest and trustworthy	2	15	15	2	1	2.57	35
Charitable	3	11	18	3	0	2.60	35
Hospitable and friendly	14	18	2	1	0	1.71	35
answered question							35
skipped question							31

Question 33

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

Answer Options	Response Percent	Response Count
1.	100.0%	35
2.	65.7%	23
3.	60.0%	21
answered question		35
skipped question		31

No	Response Date	1.	2.	3.
1	Jun 24, 2009 7:29 PM	No comments		
2	Jun 25, 2009 12:22 PM	Georgia	Azerbaijan	
3	Jun 25, 2009 12:28 PM	Georgia	Azerbaijan	Ukraine
4	Jun 26, 2009 9:50 AM	-	-	-
5	Jun 26, 2009 10:20 AM	Georgia		
6	Jun 26, 2009 10:54 AM	Georgia	Azerbaijan	Russia
7	Jun 28, 2009 7:52 PM	Don't know	Don't know	Don't know
8	Jul 2, 2009 8:49 AM	Don't know	Don't know	Don't know
9	Jul 2, 2009 10:33 AM	Turkey	Abkhazia	Montenegro
10	Jul 9, 2009 7:06 AM	Don't know	Don't know	Don't know
11	Jul 20, 2009 6:41 AM	Don't know	Don't know	Don't know
12	Jul 20, 2009 10:35 AM	Balkan countries	Greece	Turkey
13	Jul 21, 2009 7:15 AM	South CIS countries		
14	Jul 22, 2009 12:23 PM	Tajikistan	Azerbaijan	
15	Jul 24, 2009 12:27 PM	I don't really know abilities of Armenia in order to compare		
16	Jul 24, 2009 9:05 PM	-	-	-
17	Jul 27, 2009 10:58 AM	Georgia		
18	Jul 27, 2009 12:08 PM	Georgia	Greece	Spain

No	Response Date	1.	2.	3.
19	Jul 27, 2009 1:29 PM	Uzbekistan		
20	Jul 27, 2009 1:37 PM	I don't know		
21	Jul 27, 2009 3:18 PM	Caucasus		
22	Aug 8, 2009 8:45 AM	Georgia	Caucasus	Crimea
23	Aug 21, 2009 12:36 PM	Jordan	Israel	Tanzania
24	Aug 23, 2009 6:56 PM	Azerbaijan		
25	Aug 24, 2009 9:54 AM	Kazakhstan	Azerbaijan	Turkey
26	Aug 24, 2009 10:34 AM	There isn't	There isn't	There isn't
27	Aug 24, 2009 12:07 PM	Turkey	Egypt	Tunisia
28	Aug 25, 2009 11:19 AM	I can't say because I don't know Armenia as tourism product		
29	Aug 25, 2009 2:40 PM	Georgia		
30	Aug 26, 2009 8:21 AM	Abkhazia	Turkey	Russia
31	Sep 3, 2009 8:12 PM	Bulgaria	Russia	Nepal
32	Sep 7, 2009 6:21 AM	Abkhazia	Russia (Pyatigorsk)	Russia (Sochi)
33	Sep 8, 2009 8:18 AM	Turkey	India	Chili
34	Sep 9, 2009 8:11 AM	Abkhazia	Russia	Azerbaijan
35	Sep 18, 2009 7:51 AM	I cannot		

Question 34

For how many years have you been in operation?		
Answer Options	Response Percent	Response Count
1-5	25.7%	9
6-10	34.3%	12
11-15	28.6%	10
16+	11.4%	4
answered question		35
skipped question		31

Question 35

What are your three most popular destinations?		
Answer Options	Response Percent	Response Count
1.	100.0%	35
2.	94.3%	33
3.	94.3%	33
answered question		35
skipped question		31

№	Response Date	1.	2.	3.
1	Jun 24, 2009 7:30 PM	Crimea	Sochi	Scandinavian countries
2	Jun 25, 2009 12:23 PM	Europe	Russia	Near Moscow
3	Jun 25, 2009 12:29 PM	Europe	Islands	UAE
4	Jun 26, 2009 10:04 AM	We work as ordered by clients. All world		
5	Jun 26, 2009 10:21 AM	Turkey	Greece	Italy
6	Jun 26, 2009 10:55 AM	Tunisia	Czech Republic	Russia
7	Jun 28, 2009 7:52 PM	Bus tours through Russia	Excursion tours	Religious tours
8	Jul 2, 2009 8:51 AM	Greece	Finland	Sweden
9	Jul 2, 2009 10:34 AM	Spain	Scandinavian countries	Turkey
10	Jul 9, 2009 7:16 AM	Organization of 2,3 days tours	Organization of Russian tourists groups	Individual tourists arrangement
11	Jul 20, 2009 6:41 AM	China	Germany	Taiwan
12	Jul 20, 2009 10:35 AM	Sochi and Anapa	Caucasian Mineral Waters	Regions of Russia
13	Jul 21, 2009 7:15 AM	Germany	USA	Italy
14	Jul 22, 2009 12:23 PM	Black Sea	StPeterburg	Turkey
15	Jul 24, 2009 12:28 PM	Europe	Turkey	Egypt

№	Response Date	1.	2.	3.
16	Jul 24, 2009 9:05 PM	Exotic countries	VIP tours	Online booking
17	Jul 27, 2009 10:59 AM	Greece	Spain	Turkey
18	Jul 27, 2009 12:08 PM	Turkey	Greece	Spain
19	Jul 27, 2009 1:29 PM	Russia	France	Norway
20	Jul 27, 2009 1:38 PM	Bus rental	Bus tours to Europe	Avio to individuals
21	Jul 27, 2009 3:23 PM	South Korea	Japan	Russia
22	Aug 8, 2009 8:45 AM	Bulgaria	Romania	Vietnam
23	Aug 21, 2009 12:37 PM	France	Switzerland	Russia
24	Aug 23, 2009 6:56 PM	Tunisia	France	Russia
25	Aug 24, 2009 9:54 AM	France	Germany	Switzerland
26	Aug 24, 2009 10:35 AM	Turkey	Egypt	Czech Republic
27	Aug 24, 2009 12:07 PM	Europe	Africa	Asia
28	Aug 25, 2009 11:21 AM	No destinations in business travel. In MAIS destinations - Turkey, Egypt, Greece		
29	Aug 25, 2009 2:40 PM	USA	Turkey	UK
30	Aug 26, 2009 8:22 AM	Russia	Ukraine	Bulgaria
31	Sep 3, 2009 8:13 PM	Sochi - vacation and accommodation	Sochi - transport services	Sochi - business services
32	Sep 7, 2009 6:22 AM	Russia	Eastern Europe	Western Europe
33	Sep 8, 2009 8:18 AM	Turkey	Thailand	Egypt
34	Sep 9, 2009 8:12 AM	Turkey	Egypt	UAE
35	Sep 18, 2009 7:51 AM	Europe	Africa	Russia

Question 36

Please provide us with the town and country where your company is located

Answer Options	Response Percent	Response Count
Latvia	10.8%	4
Russian Federation	89.2%	33
answered question		37
skipped question		29

№	Response Date	City
1	May 19, 2009 10:07 AM	Moscow
2	Jun 24, 2009 7:34 PM	Viborg
3	Jun 25, 2009 12:26 PM	Moscow
4	Jun 25, 2009 12:30 PM	Moscow
5	Jun 26, 2009 10:05 AM	Moscow
6	Jun 26, 2009 10:22 AM	Ekaterinburg
7	Jun 26, 2009 10:57 AM	Moscow
8	Jun 28, 2009 7:53 PM	Nijni Novgorod
9	Jul 2, 2009 8:52 AM	Moscow
10	Jul 2, 2009 10:35 AM	Moscow
11	Jul 9, 2009 7:17 AM	Kozelsk
12	Jul 20, 2009 6:42 AM	Moscow
13	Jul 20, 2009 10:37 AM	Sochi
14	Jul 21, 2009 7:17 AM	Moscow
15	Jul 22, 2009 12:24 PM	Chelyabinsk
16	Jul 24, 2009 12:29 PM	Moscow
17	Jul 24, 2009 9:06 PM	Moscow
18	Jul 27, 2009 10:59 AM	Riga
19	Jul 27, 2009 12:10 PM	Riga

№	Response Date	City
20	Jul 27, 2009 1:31 PM	Riga
21	Jul 27, 2009 1:39 PM	Riga
22	Jul 27, 2009 3:28 PM	Khabarovsk
23	Aug 8, 2009 8:46 AM	Moscow
24	Aug 21, 2009 12:38 PM	Moscow
25	Aug 23, 2009 6:57 PM	StPeterburg
26	Aug 24, 2009 9:56 AM	StPeterburg
27	Aug 24, 2009 10:35 AM	Moscow
28	Aug 24, 2009 12:08 PM	Moscow
29	Aug 25, 2009 11:21 AM	Moscow
30	Aug 25, 2009 2:41 PM	Moscow
31	Aug 26, 2009 8:27 AM	Moscow
32	Sep 3, 2009 8:13 PM	Sochi
33	Sep 7, 2009 6:23 AM	Moscow
34	Sep 8, 2009 8:19 AM	Novosibirsk
35	Sep 9, 2009 8:13 AM	Moscow
36	Sep 11, 2009 1:06 PM	Moscow
37	Sep 18, 2009 7:52 AM	Moscow

Question 37

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

answered question 27

skipped question 39

№	Response Date	Name:	Company:	Website:	Email Address:
1	May 19, 2009 10:07 AM	Anastasia Shlyakhtina	Yerevan Travel	www.yerevantravel.ru	yerevantravel@mail.ru
2	Jun 24, 2009 7:34 PM	Lyudmila Aleksandrova	Private tour agency "Mir jenshini"		womensworldtour@gmail.com
3	Jun 25, 2009 12:26 PM	Natalya Doroshenko	"Voyaj tour"	www.corptravel.ru	natador@voyage-tour.ru
4	Jun 26, 2009 10:05 AM	Sergey Gorodyanskij	"Territoria" travel bureau	www.territory.travel	mail@territory.travel
5	Jun 26, 2009 10:22 AM	Yana Barac	"Fond mira"	www.fondmira.ru	info@fondmira.ru
6	Jun 26, 2009 10:57 AM	Oljga Polyakova	"Ekvatour"	www.ekvatour.ru	alex@ekvatour.ru
7	Jun 28, 2009 7:53 PM	Oljga Romanova	"Romanova Olga's" travel company	www.romanova-tour.ru	info@romanova-tour.ru
8	Jul 2, 2009 10:35 AM	Vitalij			vitali@yaziki.ru
9	Jul 9, 2009 7:17 AM	Ekaterina		www.kozelsktour.ru	
10	Jul 20, 2009 6:42 AM	Oksana Viktorovna Jarkova	"Intour Garant\Expo Plus" companies group	www.intourgarant.ru ; www.expo-plus.ru ; www.expochina.biz	PR@intourgarant.ru
11	Jul 20, 2009 10:37 AM	Sergej Yurievich	"Yug Kurort" Med Service	www.sochi-ukms.ru	
12	Jul 21, 2009 7:17 AM	Viktor	"Travel4business"	www.travel4business.ru	victor.klimenko@travel4business.ru
13	Jul 22, 2009 12:24 PM	Flarid Gaymatov	"Palitra-Tour"	www.palitratur.goy-goy.ru	palitra-tour@list.ru
14	Jul 24, 2009 12:29 PM	Lolita Kuzmina	"DOLORES travel"	www.dolores-travel.ru	boss@dolores-travel.ru
15	Jul 24, 2009 9:06 PM	-	-	-	-
16	Jul 27, 2009 12:10 PM	Vadim Chemis	"Lattur SIA"	www.lattur.lv	mail@lattur.lv
17	Jul 27, 2009 1:31 PM	Tatyana Selyuto	"T.B. VIESTURDARZS"	www.viesturdarzs.lv	info@viesturdarzs.lv
18	Jul 27, 2009 1:39 PM	Galina Soroko	"SIA SIBUS"	www.sibus.lv	mail@sibus.lv
19	Jul 27, 2009 3:28 PM		"Dalgeo Tours"	http://www.dalgeo.ru/about/	postmaster@dalgeo.khv.ru
20	Aug 23, 2009 6:57 PM				marigm@mail.ru

№	Response Date	Name:	Company:	Website:	Email Address:
21	Aug 24, 2009 9:56 AM	Elizaveta Muraito	"West Bridge Hotel"	www.novotel.spb.ru	H5679-SL3@accor.com
22	Aug 25, 2009 11:21 AM	Galina Polischuk	"Continent Express"	www.continent.ru	galina@continent.ru
23	Aug 26, 2009 8:27 AM	Vladislava Savochkina	"SKO-VILS"	www.sko-vils.ru	vvs@sko-vils.ru
24	Sep 8, 2009 8:19 AM	Natalya			nettlenat@mail.ru
25	Sep 9, 2009 8:13 AM		"Mir"		
26	Sep 11, 2009 1:06 PM	Andrey	"Cakhkadzor Travel"	www.cahkadzor.ru	info@cahkadzor.ru
27	Sep 18, 2009 7:52 AM	Vladimir Shlemin	"Fly Express"	www.flyex.ru	info@flyex.ru



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