



A.R.S. Progetti S.P.A.
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**Preparation of Destination Management Organization (DMO)
Development Model for the Republic of Armenia**

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ASSIGNMENT 2

TASK 4

Tourism Niches Identification and Development Plans

Niche 1: CULTURAL AND HERITAGE TOURISM

Deadline: 8.11.2022

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LIST OF ABBREVIATIONS

Abbreviation	Denomination
AR	Augmented Reality
ATLAS	European Association for Tourism and Leisure Education
B&B	Bed and Breakfast
CAGR	Compound Average Growth Rate
CH (sites)	Cultural Heritage
CSAT	Customer Satisfaction Score
C&H (tourism)	Cultural and Heritage
DMO	Destination Management Organization
DIY	Do it yourself
EC	European Commission
EU	European Union
ICOMOS	International Council of Monuments and Sites
MR	Mixed Reality
NGO	Non-governmental Organization
RA	Republic of Armenia
NPS	Net Promoter Score
SMEs	Small and Medium Enterprises
SMP	Site Management Plan
UNESCO	United Nations Education, Science and Culture Organization
UNWTO	United Nations World Tourism Organization
UK	United Kingdom
US	United States
VR	Virtual Reality
WB	World Bank
WHL	World Heritage List
XR	Extended Reality



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1. EXECUTIVE SUMMARY

1.1 Articulation of the report

The present study refers to Assignment 2 of “Preparation of Destination Management Organization (DMO) Development Model for the Republic of Armenia”, whose main objectives are:

- Analyze and assess the top potential niches for tourism development, through desk review, physical visits, key informant interviews and focus groups;
- Provide conceptual 3 to 10 years' approach to develop the niches, based on identified locations/towns/regions pertaining to each category based on historical or present data and/or future development potential;
- provide through the conceptual approach the brief SWOT analysis and status quo data per each niche, followed by 3-10 years hard and soft infrastructure needs to develop each niche and identification of potential market sources/countries per niche.

Particularly, the present task analyses the niche “**Cultural and Heritage (C&H) Tourism**”.

The study is organized in **five sections**. The first one is intended to provide the **conceptual framework** for the interpretation of the tourism niche. It includes a definition of Cultural and Heritage Tourism along with a profiling of C&H travelers. A brief historical background is provided, along with a description of international C&H visitors, which represent the market source for the niche. Travel motivations are investigated along with expected tourism experiences. Key data from main international markets are provided, with particular regard to European ones (Germany, UK, Italy, France, Netherlands and Spain). Emerging patterns are deepened and it is provided an insight with regard to main trends: (i) the shift from cultural to creative tourism; (ii) the growth of accessible tourism; (iii) the long-lasting impact of Covid-19 pandemic and (iv) the application of digital realities to C&H valorization. Some international best practices are also proposed. Finally, the value chain tool is introduced as an instrument capable to detail primary and secondary activities that can be adapted to address the specific needs of the C&H segment.

The second section analyzes the current **performance of C&H tourism in Armenia**. It uses secondary sources, integrated, where necessary, by primary ones, and illustrates the following elements:

1. the supply, distinguishing between tangible and intangible heritage, and among historical and cultural sites, museums, libraries, theatres and religious structures;
2. the demand, distinguishing among international and domestic demand, and providing also insights about tourism revenues;
3. key CH&H stakeholders, including Government actors, the Armenia Apostolic Church, private operators, NGOs and international actors.

The section concludes with the formulation of the **SWOT analysis** of the Armenia C&H tourism niche, which highlights key gaps to be covered for its development.

The synthesis brings to the formulation of **Recommended Development Policies** (section three), where the strategy is illustrated, including main and specific objectives, followed by the action plan. The action plan is driven by four **strategic objectives**:

1. Creation of a competitive and sustainable portfolio of cultural and heritage tourism products;
2. Assurance of the market visibility and accessibility of such portfolio;
3. Increase of the economic impact from cultural and heritage tourism;
4. Adaptation of the institutional framework for cultural and heritage tourism development.

To each strategic objective corresponds a hand of **specific objectives**, which in turn bring to **key actions**. Each action is represented, in the fourth section, by a sheet, which illustrates key features, namely:

- a) Strategic objective;
- b) Specific objective;
- c) Description;
- d) Key activities;
- e) Key Performance Indicators;
- f) Key stakeholders involved;
- g) Source of funding;
- h) Time frame;
- i) Recommendations for implementation.



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The fifth and final section provides a **sustainability assessment** of the action plan to highlight possible drawbacks and risks to be prevented, along with positive impacts. These include providing economic benefits, limiting socio-cultural problems and encouraging community involvement, as well as preventing negative environmental impacts. Planning of manpower, adaptation of legislation and implementation of investment policies and particularly micro-incentives are also considered as essential tools to ease the implementation of the plan. Governance and management of the tourism niche, both at the national and at the local level is finally discussed.

1.2 Key findings and recommendations

C&H currently represents the most relevant tourism niche for Armenia. The draft Armenia Tourism Strategy¹ estimated that it represented the **primary activity for 49% of tourist visiting Armenia**. It observes that *“through the country’s deep history, many archaeological sites, and strong ties to the Christian religion, cultural tourism is the bedrock of Armenia’s tourism and a primary reason why tourists travel to Armenia...”*.

Despite such evidence, the analysis of the current situation of cultural tourism shows that **the niche lacks a dedicated valorization strategy**, whose starting pillar must be the provision of tourism product, its protection and sustainable use. Such observation is reflected in the first strategic objective – **Creation of a competitive and sustainable portfolio of C&H tourism products** – which is articulated in four specific objectives:

- The protection of C&H key assets, by adopting and implementing site management plans;
- The definition of a portfolio of accessible C&H routes and events, formed of different sub-products (C&H national routes to be recognized according to specific criteria; an agenda on national festival based on authentic Armenia cultural traditions);
- The assurance of quality services at C&H sites, in line with those standards to which international tourists are used to;
- The increase of capacity of C&H tourism operators by developing educational and training programs particularly for the private sector while taking advantage of international cooperation, for instance with EU institutions, to promote international training exchange programs especially targeted to youth and women.

The creation of the cultural product must be necessarily integrated by the adoption of strategies to **ensure the market visibility and accessibility of C&H portfolio**, which represents the second strategic objective. It reminds to two specific objectives, which are the adoption of effective marketing strategies and the increase of on-site and on-line accessibility to the C&H. Not surprisingly, it is suggested for marketing strategies to privilege web and social media marketing, along with trade and press marketing, as both are featured with excellent value for money. Traditional analogic marketing should be left to local information needs.

Meanwhile, it is advised to take advantage of two key trends of the C&H sector. The first is fuelled by the demand, which sees an increased unsatisfied request of **accessible tourism** by people bringing special accessibility needs (visible and not), as witnessed by several researches. The second refers to the increasing popularity of digital tool to provide **virtual, augmented or mixed reality experiences**. Given the long Armenian tradition, and what went lost through historical events, such new tools provide tremendous opportunities to enhance visitor experience to CH sites.

CH development should take place posing great attention to the **maximization of positive economic and social impact for host communities**, which represents the third strategic objective of the action plan. Such objective is articulated in three specific objectives. The first goes through the involvement of local communities, which is pursued trying to promote cultural ecosystems and to support creative tourism around cultural sites. Such approach replicated the models that have been successfully experienced in cultural destinations worldwide, where tourism has stimulated the spring of many new activities in the cultural sphere. Particularly, it is advised to implement an action which has been very successful in Europe and already adopted by single countries, which is the launch of the National Competition for the Creative Capital of Armenia, which is supposed to be followed by grants aimed at sustaining the development of the creative industries by involving local communities. In order to qualify such effort, specific actions are foreseen to stimulate the production and sales of quality merchandising, which is currently missing at Armenian cultural sites. Such objective can be reached by defining standards for Armenia typical arts & crafts and later concede their industrial utilization so as to market a certified high-quality merchandising. Finally, such previous objectives are supported by the introduction of micro-grants mechanism for the cultural and creative sector, which can greatly help to open up entrepreneurs’ energies, particularly – as said – by youth and women, that are worldwide the driver of cultural and creative tourism.

¹ RA (2019). *A Strategy for the Growth of Armenia’s Tourism Sector: 2020 – 2030* October, Draft



The strategy would not be sustainable if not supported by ad-hoc adaptation and innovation of current legislation regulating the field. The **update of the institutional framework for cultural and heritage tourism development** thus represents the fourth pillar of the C&H strategy. It includes the regulation of cultural tourism professions and operators, with the recognition of professions such as that of tourism guide, which is currently missed in Armenia, along with the regulation of cultural tourism NGOs, considering the possible provision of fiscal benefits. Special attention should be also dedicated to new accommodation profiles, such as scattered hotels or arts B&B, which are increasingly popular among European and North America cultural tourists.

Meanwhile, the growth of the sector requires the regulation of **cooperation between the public and the private sphere**, including sponsorships, patronage and donations. At the same time the implementation of the strategy must rely of reliable data and statistics which area also currently missing. To such extent, collaboration with Armenian universities, to also promote direct students' involvement in the strategy, is advised.

As requested by TORs, a time schedule for the implementation of the action plan ranging up to 10 years is also provided. Some actions are preparatory or easy-doing and should be prepared soon. They include regulatory and legislator acts, capacity building and other soft interventions such as the formulation of national agenda of cultural festivals or marketing actions. Hard interventions, such as the creation of C&H routes or physical improvements at cultural sites are foreseen in a longer period.

2. CONCEPTUAL FRAMEWORK

2.1 Definition of Cultural and Heritage Tourism

To correctly define C&H tourism, it is important to provide a definition of its "raw material": Cultural Heritage (CH). The United Nations Education, Science and Culture Organization (UNESCO) defines CH as:

*Cultural heritage includes intangible and tangible movable and immovable heritage as an aggregate of cultural values, which bear the historical memory and national identity and have scientific or cultural importance*².

Cultural Heritage Act, UNESCO

Cultural values are a specific prerequisite for the development of cultural tourism. They can be grouped under three headings:

- **Cultural and historical monuments and sites:** archaeological sites, monuments and architectural complexes, monasteries and churches, ethnographic monuments and museums and others,
- **Works of art:** movable tangible cultural values: a collection of art objects, works of painting, sculpture, folk crafts, embroidery, costumes, cult objects, masterpieces of cinema and literature, etc.,
- **Periodic and episodic events:** festivals, shows, congresses, fairs, celebrations and more.

Taking this into consideration, United Nations World Tourism Organization (UNWTO) defines cultural tourism as: *"A type of tourism activity in which the visitor's essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination"*³.

UNWTO General Assembly, at its 2nd session (2017)

Another widely recognized definition is the one provided by the European Association for Tourism and Leisure Education (ATLAS):

*The movement of people to cultural attractions away from their permanent place of residence, with the intention to gather new information and experiences to satisfy their cultural need*⁴.

Cultural Tourism Research Project, ATLAS (1991)

In cultural tourism, CH is the attraction/product that motivates travelling to a destination:

*Attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions*⁵.

UNWTO General Assembly, at its 2nd session (2017)

² Cultural Heritage Act, Article 2, point 1, URL: http://www.unesco.org/culture/natlaws/media/pdf/bulgaria/bulgaria_culturalheritageact_2009_entof.pdf

³ Nature and characteristics of cultural tourism, URL: <http://www.montana-vidin-dolj.com/en/publications/?NewsId=3>

⁴ Greg Richards (1996, ed.) Cultural Tourism in Europe. CABI, Wallingford, p. 2, URL: http://www.tram-research.com/cultural_tourism_in_europe.PDF

⁵ UNWTO. Tourism and Culture. UNWTO: Madrid. In <https://www.unwto.org/tourism-and-culture>



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A cultural trip therefore focuses on the **feeling of the cultural environment**, including **landscapes, visual and performing arts, lifestyles, values, traditions and events**⁶. There are indeed diverse subcategories of cultural tourism: heritage tourism; art tourism; creative tourism; urban cultural tourism; rural cultural tourism; local cultural tourism.

When developing cultural tourism, it is utterly important to protect and preserve cultural and natural heritage of the destination⁷. The main principles suggested by International Council of Monuments and Sites (ICOMOS) in its International Cultural Tourism Charter about Managing Tourism at Places of Heritage Significance are:

- Principle 1. *Since domestic and international tourism is among the foremost vehicles for cultural exchange, conservation should provide responsible and well managed opportunities for members of the host community and visitors to experience and understand that community's heritage and culture at first hand.*
- Principle 2. *The relation between Heritage Places and Tourism is dynamic and may involve conflicting values. It should be managed in a sustainable way for the present and future generations.*
- Principle 3. *Conservation and Tourism Planning for Heritage Places should ensure that the Visitor Experience will be worthwhile, satisfying and enjoyable.*
- Principle 4. *Host communities and indigenous people should be involved in planning for conservation and tourism.*
- Principle 5. *Tourism and conservation activities should be of benefit for the host community.*
- Principle 6. *Tourism promotion programs should protect and enhance Natural and Cultural Heritage characteristics*⁸.

12th ICOMOS General Assembly in Mexico, in October, 1999

2.2 Profile of Cultural and Heritage tourists

2.2.1 Background

In its contemporary form, cultural tourism dates back to the 1980s, although its origin reminds to the early years of the 18th and 19th centuries, when it was fashionable, for wealthy British families, to send their sons on a Grand Tour of Europe, especially Italy, to be introduced to art, history and culture⁹.

With the growth of mass tourism, after the World War II, at least in the western world, cultural tourism was primarily driven by the interest of the *baby boom generation* to visit major cultural sites and attractions, such as museums and monuments, often travelling in groups. Baby Boomers are indeed the generation that mostly contributed to the strong growth of cultural tourism. The generations after them, generation Y (*millennials*) and generation Z (*centennials*), drive the demand for **more authentic, unique, small-scale and personal experiences**. For them it is more important to *be* somewhere, rather than to *go* somewhere. As consequence, they prefer to travel on their own¹⁰.

2.2.2 General profile

Cultural and heritage travelers include those who would visit:

- Historical attractions, monuments, or landmarks;
- Museums, art galleries, or theaters;

Or take part in:

- Festivals, concerts, or performances;
- Culturally significant neighborhoods or communities.

Such tourists generally want to learn something about the beliefs and practices — and the struggles and successes — that shaped the shared identity of a people. Some may share a degree of ancestry with the people whose history they are interested in.

⁶ The main C&H tourism attractors are indeed archaeological sites and museums, architecture (ruins, famous buildings, towns), art, sculpture, crafts, galleries, festivals, events, music and dance (classical, folk, contemporary), drama (theatre, cinema), language and literature study, tours, events, religious festivals, pilgrimages, etc.

⁷ UNESCO seeks to encourage the identification, protection and preservation of cultural and natural heritage around the world considered to be of outstanding value to humanity. This is embodied in an international treaty called the Convention concerning the Protection of the World Cultural and Natural Heritage⁷, adopted by UNESCO in 1972.

⁸ International Cultural Tourism Charter, Managing Tourism at Places of Heritage Significance (1999), URL: http://www.icomos.org/charters/tourism_e.pdf

⁹ The British educational system was indeed based on Latin and Greek literature and philosophy and an educated person was taught the classics from a very early age. Therefore, aristocratic families regarded this journey to Europe as an opportunity to complete their education. Such journey was undertaken by young gentlemen and a few ladies often accompanied by a "learned guide" - a person who could act as a tutor and chaperone. These guides, usually highly educated, were known in Italian as "cicerone" and it was their job to explain the history, art and literature to their young charges.

¹⁰ Richards G. (2018). "Cultural tourism: A review of recent research and trends". *Journal of Hospitality and Tourism Management*, 36, pp.12-21.

Cultural heritage tourists are the first and foremost tourists, who travel to experience other cultures and learn about the past, and show consistent differences with recreational tourists, although they may share the same amenities such as restaurants and hotels¹¹.

Researches have however highlighted some **peculiar behaviors** that distinguish culture and heritage from more recreational tourists:

- *They are higher spending.* Culture and heritage tourists spent as much as 38% more per day and stayed 22% longer overall compared to other kinds of travelers¹².
- *They are younger.* A study done in Budapest, Prague, and Warsaw, which old city centers is listed in the UNESCO WHL, revealed that largest age group consisted of tourists 20 to 39 years of age, with both in Prague and Warsaw the highest being in 15 to 30 years age cohort. The share of senior citizens was the smallest – below 5%. Also, with regard to domestic tourism, in Warsaw, young groups of tourists also tended to dominate, with 42% being within the age group 15-49, due to a large number of school trips and visits by relatives and friends¹³.
- *They are educated and affluent.* The same study showed that there were significantly more full-time employees (56%) and students (35%).
- *They tend to stay longer at the destination.* The survey showed also that the average length of a tourist stay was 2 to 4 days, with variations based on tourist age, country of origin, and purpose of visit. The longest stays were reported by long-haul tourists¹⁴, whereas most domestic tourists (83%) stayed one day in each studied city.
- *They are web-driven.* The surveyed tourists used different sources of information before their trip, with Internet being the most popular. Their self-organized travel was based on information posted on the websites of the studied cities (89%), travel web portals (51%) and social networks (42%).
- *They rely on word-of-mouth.* About 30% of visitors took advice from friends or relatives who had visited some of these cities before.



Figure 1: Cultural travelers' profile

2.2.3 Travel motivations

The cultural tourism market can be divided into two major groups, that is:

- a) tourists whose primary travel motivation is culture related (5-10%);

¹¹ Robert McNulty, Russell Koff, Cultural Heritage Tourism, pp. 7-8, <https://www.americansforthearts.org/sites/default/files/culturalheritagetourism.pdf>

¹² How Culture and Heritage Tourism Boosts More Than A Visitor Economy, <https://www.mytravelresearch.com/culture-and-heritage-tourism-boosts-visitor-economy/>

¹³ Mariola Tracz, Małgorzata Bajgier-Kowalska, "Profile of tourists visiting cultural heritage cities: Comparative study of selected cities in Central Europe", *Geographia Polonica*, 2019, Vol. 92, Issue 4, pp. 455-468, <https://doi.org/10.7163/GPol.0159>, https://www.researchgate.net/publication/337967282_Profile_of_tourists_visiting_cultural_heritage_cities_Comparative_study_of_selected_cities_in_Central_Europe. A total of 550 tourist surveys were completed including 150 in Prague, 150 in Budapest, and 250 in Warsaw.

¹⁴ Those were visiting from the US, Canada, South Korea, China, and Brazil (more than 5 days). In the case of one or two-day stays, the most common countries of origin were UK, Ireland, Germany (especially individuals 15 to 39 years old), Czech Republic, Slovakia, Austria, and Romania.



b) tourists whose primary motivation is not related to culture (90-95%).

Indeed, the majority of cultural tourists, simply like to visit cultural attractions or enjoy culture as one of the activities and perceive this as complement for their trip.

Most cultural tourists also visit main attractions which are “marked” as places worth to visits¹⁵, but without being culture specialists. As the market for this kind of cultural tourism has grown dramatically over the past few decades, it caused overcrowding of many of such destinations, resulting in a loss of their authentic character. As a consequence, an increasing number of cultural tourists no longer feels attracted to crowded cultural attractions, instead preferring more personal, small-scale and authentic experiences.

Examples of this include artisanal, craft and hand-made products (tangible/material culture), and unforgettable and truly inspiring experiences that touch visitors in an emotional way and connect them with that specific place, people and culture (intangible/immaterial culture)¹⁶.

The above-mentioned study¹⁷, showed the following motivations to travel according to age groups:

- **5 to 29 age group:** discovering unknown places and cultures (58%), meeting with friends (18%), participation in entertainment and cultural events (39%), and education (9%);¹⁸
- **30 to 39 age group:** sightseeing historical sites (50%), leisure and recreation (35%), participation in entertainment events (42%), sports and cultural events (24%), and business meetings (14%);
- **40 to 59 / 60 and above age group:** sightseeing historical sites and learning about a city's culture (72%), leisure (36%), meetings with friends and family (27%), health reasons (11%), and sightseeing religious sites.

2.2.4 Expected tourism experience

Expected tourism experience is connected with travel motivations:

- Discovering new cultures,
- Discovering heritage sites,
- Leisure and entertainment,
- Participation in entertainment and cultural events, etc.

Based on the various types of interests and experiences, the cultural tourism market can be subdivided into a number of niches, listed in table 1¹⁹.

Niche market	Products and services	Examples
Tangible (material) heritage	Museums, art galleries, historic properties, places of worship, architectural tourism, other visitor attractions.	The north of Colombia has a violent history. After the demobilisation of paramilitary forces, communities in the Antioquia state's Urabá region started to reconcile and established the El Carlos Ecotourism and Archaeological Centre in which tourism, handicrafts, fisheries and cacao farming are integrated. Songup Folk Village on Jeju Island in Korea offers a cultural heritage with traditional lifestyles and historic landscape dating back 500 years.
Intangible (immaterial) culture	Music festivals and events, film, DNA/genealogy, battlefield, dark tourism, other festivals/events.	Mahika Mahikeng Cultural Festival, South Africa. Audley Travel in the UK offers battlefield tours in Kwazulu Natal, South Africa.
City breaks		Acacia Africa offers city breaks, for example as part of an extended tour. In Colombia, 5Bogota is an example of a local tour operator that connects local hosts with travellers.
Food & Wine	Food festivals, food trails, food museums, food tastings, cooking classes, wine tastings, wine trails, vegan tourism, producer visits, local farmer" markets.	There are many tour operators that provide food and wine holidays and tours to Latin America or Africa. For example, Upscapetravel, or Giltedge Africa.
Community-based tourism (CBT)	It refers to tourism experiences hosted and managed by local communities, and which are sustainable and responsible. It includes homestays, visits to villages/communities, local festivals, learning local crafts, participation in community life.	Il Ngwesi offers cultural and wildlife experiences, while profits flow back to the Maasai owners in the community. Other examples are: Portsmouth Indian River Tour Guides Association in Dominica. The small, award-winning, off-grid eco lodge 3Rivers Dominica in the Rosalie rainforest valley in Dominica.

¹⁵ John Urry (2002). *The Tourist Gaze*. London: Sage Publications

¹⁶ Richards G. (2018). Op. cit.

¹⁷ Mariola Tracz, Małgorzata Bajgier-Kowalska, Op. cit.

¹⁸ It has to be noted that 20 to 39 age group originating in Great Britain, Germany, France, Italy, and Spain most often cited entertainment recreation, and leisure as the primary reasons for visiting (69%)

¹⁹ Richards G. (2018). Op. cit.



Religious/Spiritual tourism	Pilgrimage, visiting a sacred site, church/mosque/temple tourism, travel for the purpose of mission/worship.	At St. Helena Women's Group, Jamaica women are subsistence farmers who make finely woven and unique handicraft souvenirs, such as purses, place mats, bowls, vases, picnic and laundry baskets, bread trays, wall decorations and bags. Tourists purchase their products in gift shops in hotels. Andaman Discoveries in Thailand provides home-stay programmes. The Khama Rhino Sanctuary is a community-based wildlife project that offers accommodation, activities, game drives, camping, and educational activities.
		In Africa, the Vodun festival in Benin and the Osun-Osogbo festival of the Yoruba people of Western Nigeria are religious events that attract tourists from all over the world. The Ethiopian celebration of Timkat (also known as Epiphany) is another famous attraction.

Table 1: Niche markets and specialist niche markets in cultural tourism

2.2.5 International markets

There is no doubt that interest in **cultural heritage tourism is strong and growing stronger**. Recent studies have shown that 78% of US tourists take part in a cultural heritage activity while traveling²⁰ (more than the number that report visiting friends or family while traveling), while others estimated that international cultural tourism market is expected to increase by USD 3.76 bn from 2020 to 2025, with a CAGR of 16.4%²¹.

The growth of cultural tourism is proven also by the increase of competition among cultural tourism suppliers too. A key indicator refers to the **WHL of UNESCO**. There are 897 cultural properties in WHL²², with a growing search for recognition, which proves the increasing competition of the cultural tourism market.

The *Travel and Tourism Development Index* measures *Cultural resources pillar*, which is the availability of cultural resources as archaeological sites and entertainment facilities. It also captures how cultural resources are promoted, developed and protected rather than the actual existing cultural heritage of a country.

Rank	Economy		Value	Score (1-7 best)	Dist. from Highest
1	Italy	(i)	6.5	6.5	<div></div>
2	China	(i)	6.5	6.5	<div></div>
3	Spain	(i)	6.5	6.5	<div></div>
4	Japan	(i)	6.4	6.4	<div></div>
5	Mexico	(i)	5.9	5.9	<div></div>
6	Germany	(i)	5.9	5.9	<div></div>
7	France	(i)	5.9	5.9	<div></div>
8	Korea, Rep.	(i)	5.7	5.7	<div></div>
9	United Kingdom	(i)	5.2	5.2	<div></div>
10	Brazil	(i)	5.1	5.1	<div></div>
11	United States	(i)	5.1	5.1	<div></div>
12	India	(i)	5.0	5.0	<div></div>
13	Turkey	(i)	4.4	4.4	<div></div>
14	Portugal	(i)	4.3	4.3	<div></div>
15	Australia	(i)	4.1	4.1	<div></div>

Table 2: Cultural resources, Travel and Tourism Development Index 2021

Table 2 shows the countries with highest score in this pillar²³.

Returning to the cultural tourism market, the previous mentioned research segmented it by *type* (Domestic cultural tourism and International cultural tourism), *end-user* (Cultural eco-tourism, Indigenous cultural tourism,

²⁰ Cultural and Heritage Travel Contributes More Than \$192 Billion Annually to the U.S. Economy, <https://nasaa-arts.org/newsletter/2010-nasaa-notes-issues/january-2010-nasaa-notes/cultural-heritage-travel-contributes-192-billion-annually-u-s-economy/>

²¹ Technavio (2021). *Cultural Tourism Market Growth, Size, Trends, Analysis Report by Type, Application, Region and Segment Forecast 2021-2025*, <https://www.technavio.com/report/cultural-tourism-market-industry-analysis>

²² <https://whc.unesco.org/en/list/>

²³ Travel and Tourism Development Index 2021, <https://www.weforum.org/reports/travel-and-tourism-development-index-2021/explore-the-data>



and Socio-cultural tourism), and *geographic location* (Europe, APAC, North America, MEA, and South America)²⁴.

Europe is expected to register the highest growth rate (37%) among the other regions, with significant business opportunities during the forecasted period. Germany is the largest European source market in terms of market size, followed by the UK, Italy, France, the Netherlands and Spain.

Table 3 shows the percentage of residents per country who indicated culture/city trip as holiday reason and the number of tourists leaving the country for holiday purposes. Particularly, the third column gives an indication of the market size of each country²⁵. Figures clearly illustrate the top market (Germany) is over five times larger than the smallest (Spain):

Country	% residents per country with culture or a city trip as a reason for going on holiday in 2015	Outbound tourism, no. of overnight stay tourists in 2018 (in millions)	Estimated no. of overnight stays of tourists travelling for a cultural reason or city trip in 2018 (in millions)
Germany	50%	109	54
UK	48%	70	34
Italy	66%	33	22
France	62%	27	17
Netherlands	65%	24	15
Spain	50%	19	10

Table 3: Key statistics of the 6 most important European markets

Germany²⁶

As anticipated above, Germany is the most significant European market for cultural tourism. In 2018, 109 million German tourists went abroad for a holiday, of which half of them for cultural reasons, resulting in an estimated amount of 54 million tourists. Of the six countries listed, German tourists spent the most on outbound travel. The personal expenditure of outbound German tourists was also the biggest.

Key indicator		Value
Population size, in millions		83
Nominal GDP in trillion Euros (2019)		3.4
Nominal GDP per capita in thousand Euros (2019)		42
No. of outbound overnight stay tourists in millions (2018)		108,542
% of holiday makers' motivation being ... (2015)	Culture (religious, gastronomy, arts)	26
	City trip	24
	Event (sporting events, festivals, clubbing)	5
No. of holiday makers' motivation being ... (own calculations)	Culture (religious, gastronomy, arts)	28,221
	City trip	26,050
	Event (sporting events, festivals, clubbing)	5427
Outbound tourists' expenditure (2018)	Travel (exclusive passenger transport) in billion euros	79
	Personal (exclusive business/professional trips) in million euros	72,871

Table 4: Key statistics Germany

United Kingdom²⁷

UK is clearly the second-largest market for cultural tourism in Europe. This position is mainly caused by the large number of outbound tourists: 70 million in 2018, which is directly related to its population, being the second-largest in Europe (67 million). In 2019, the country had also the second-largest nominal GDP of the top 6 market countries in the EU (€2.5 trillion), again after Germany, and the third-largest nominal GDP per capita (€28.000), after Germany and the Netherlands.

A share of UK cultural tourists 48% opts for a culturally motivated holiday abroad – 26% for culture in general and 22% for a city trip. This amounts to an estimated number of outbound cultural tourists of 34 million in 2018. Events are also quite popular among British holiday makers going abroad (13%).

In 2018 the travel expenditure of British outbound tourists amounted to €65,517 million, which was 2.4% of the GDP.

²⁴ Technavio (2021). Op. cit.

²⁵ Richards G. (2018). Op. cit.

²⁶ Richards G. (2018). Op. cit.

²⁷ Richards G. (2018). Op. cit.



Key indicator		Value
Population size, in millions		67
Nominal GDP in trillion Euros (2019)		2.5
Nominal GDP per capita in thousand Euros (2019)		38
No. of outbound overnight stay tourists in millions (2018)		70,386
% holiday makers with motivation being ... (2015)	Culture (religious, gastronomy, arts)	26
	City trip	22
	Event (sporting events, festivals, clubbing)	13
No. of holiday makers with motivation being ... (own calculations)	Culture (religious, gastronomy, arts)	18,300
	City trip	15,485
	Event (sporting events, festivals, clubbing)	9,150
Outbound tourists' expenditure (2018)	Travel (exclusive passenger transport) in million euros	65,517
	Personal (exclusive business/professional trips) in million euros	-

Table 5: Key statistics United Kingdom

Italy²⁸

The number of outbound cultural tourists from Italy is estimated at 22 million. If we look at the proportion of all outbound travellers motivated by culture, Italy is the European country that stands out with 66% of the 33 million outbound holidaymakers. The Italian cultural tourism market is however less, because it is more fashion-driven. As opposed to the other five countries in the top 6, city trips are more popular (36%) than culture in general (30%).

The average length of an outbound holiday was 8.3 nights in 2018. Total travel spending in 2018 had a value of €24,918 million, while personal expenditure was €17,334 million. Overall outbound tourists had a value of 1.8% of the GDP, which is the lowest of the six market countries.

Key indicator	Value	
Population size, in millions	60	
Nominal GDP in trillion Euros (2019)	1.8	
Nominal GDP per capita in thousand Euros (2019)	30	
No. of outbound overnight stay tourists in millions (2018)	33,347	
% of holiday makers with motivation being ... (2015)	Culture (religious, gastronomy, arts)	30
	City trip	36
	Event (sporting events, festivals, clubbing)	9
No. of holiday makers with motivation being ... (own calculations)	Culture (religious, gastronomy, arts)	10,004
	City trip	12,005
	Event (sporting events, festivals, clubbing)	3,001
Outbound tourists' expenditure (2018)	Travel (exclusive passenger transport) in million euros	24,918
	Personal (exclusive business/professional trips) in million euros	17,334

Table 6: Key statistics Italy

France²⁹

The French market for cultural tourism is the fourth-largest. In 2018, 27 million French travellers went abroad for their holiday and 62% of them did so for cultural reasons. Among them, the interest in culture in general or in a city trip was equally divided at 31%. Overall, in 2018 about 17 million French people went on holiday abroad for cultural reasons. The average length of these holidays was 8.4 nights.

Total travel expenditure was consistently higher than for Italy, amounting to €39,696 million. Personal expenses in 2018 were €26,551 million. Outbound tourism had a total value of 2.1% of GDP.

Key indicator	Value
Population size, in millions	7
Nominal GDP in trillion Euros (2019)	2.4
Nominal GDP per capita in thousand Euros (2019)	36
No. of outbound overnight stay tourists in millions (2018)	26,914

²⁸ Richards G. (2018). Op. cit.

²⁹ Richards G. (2018). Op. cit.



% of holiday makers with motivation being ... (2015)	Culture (e.g. religious, gastronomy, arts)	31
	City trip	31
	Event (e.g. sporting events, festivals, clubbing)	9
No. of holiday makers with motivation being ... (own calculations)	Culture (e.g. religious, gastronomy, arts)	8,343
	City trip	8,343
	Event (e.g. sporting events, festivals, clubbing)	2,422
Outbound tourists' expenditure (2018)	Travel (excl. passenger transport) in million €	39,696
	Personal (excl. business/professional trips) in million €	26,551

Table 7: Key statistics France³⁰

Netherlands³¹

Despite its small size, the Netherlands has a relatively large number of outbound tourists, also due to a nominal GDP per capita which is the highest of the six countries, at €47.000.

Dutch holidaymakers show the largest interest in culture (65%), second only to the Italians (66%), with about 15 million of culturally motivated holidays abroad. Compared to the other countries in the top 6, the interest in culture in general is much bigger (39%) than the interest in city trips (26%).

Due to its small population, total travel expenditure for foreign holidays (€18,868 million) and personal expenses abroad are the lowest (€ 16,296 million) among the 6 countries. Despite this, 2.8% of the GDP was spent on outbound tourism.

Key indicator	Value	
Population size, in millions	17	
Nominal GDP in trillion Euros (2019)	0.8	
Nominal GDP per capita in thousand Euros (2019)	47	
No. of outbound overnight stay tourists in millions (2018)	23,679	
% of holiday makers with motivation being ... (2015)	Culture (religious, gastronomy, arts)	39
	City trip	26
	Event (sporting events, festivals, clubbing)	9
No. of holiday makers with motivation being ... (own calculations)	Culture (religious, gastronomy, arts)	9,235
	City trip	6,157
	Event (sporting events, festivals, clubbing)	2,131
Outbound tourists' expenditure (2018)	Travel (exclusive passenger transport) in million €	18,868
	Personal (exclusive business/professional trips) in million €	16,296

Table 8: Key statistics Netherlands

Spain³²

The market for cultural tourism in Spain is much smaller than it is in previous mentioned countries. Compared to its big population, the number of outbound tourists is relatively small (19 million). Therefore, despite the fact that half of these tourists goes on holiday for cultural reasons, there are only 10 million travellers estimated in 2018.

It is also interesting to note that the average length of the stay is relatively short (7.8 nights), while the average spending per day seems rather high (€103). According to industry experts, it is mainly the region of Catalunya (Barcelona and environment) in which people are interested in outbound cultural tourism.

The amount spent by outbound tourists on their travel is slightly lower than it is Italy and a little higher than it is the Netherlands at €million 26,670. The percentage of the GDP that is spent on outbound travel is relatively low: only 1.9%.

Key indicator		Value
Population size, in millions		47
Nominal GDP in trillion Euros (2019)		1.2
Nominal GDP per capita in thousand Euros (2019)		26
No. of outbound overnight stay tourists in millions (2018)		19,116
% of holiday makers with motivation being ... (2015)	Culture (religious, gastronomy, arts)	29
	City trip	21
	Event (sporting events, festivals, clubbing)	7

³⁰ Richards G. (2018). Op. cit.

³¹ Richards G. (2018). Op. cit.

³² Richards G. (2018). Op. cit.



No. of holiday makers with motivation being ... (own calculations)	Culture (religious, gastronomy, arts)	5,544
	City trip	4,014
	Event (sporting events, festivals, clubbing)	1,338
Outbound tourists' expenditure (2018)	Travel (exclusive passenger transport) in million €	26,670
	Personal (exclusive business/professional trips) in million €	-

Table 9: Key statistics Spain

2.3 Emerging trends

2.3.1 From cultural tourism to creative tourism

The recent years were featured by the shift from passive cultural consumption towards what it is referred to as “creative tourism”, which is strictly related to the growth of the experience economy³³. UNESCO (2006) identifies this new trend as *“travel directed toward an engaged and authentic experience, with participative learning in the arts, heritage, or special character of a place, and it provides a connection with those who reside in this place and create this living culture”*³⁴.

Creative tourism developments need to be active rather than passive and based on learning processes integrated into the social fabric innovative and dynamic sustainable based on local resources.

Research brought to identify key principles of Creative Tourism, which include³⁵:

1. Story teller or local artist could design an elevating story which could captive attentions and create inspiration for visitor to learn and create their DIY masterpiece.
2. Creative activity is designed to have participative & fun learning experiences with local guru and depth of understanding.
3. Creative activity is designed to have active participation and opportunities for host and guest to share experiences and cultural knowledge.
4. Creative activity is designed to have five senses (hear, touch, taste, see, smell).
5. Place or creative space is designed to stimulate the expression of creativity.
6. Flow of the activities is well designed to stimulate the expression of creativity.
7. Creative activity offers visitors the opportunity to develop their creative potential and could lead to the innovation of new ideas.
8. Creative tourism designer could identify the branding message and create marketing campaign.
9. Creative tourism designer could communicate the uniqueness of the activity and abreast to continuous improvement.

Worldwide, cultural tourism is slowly changing into creative tourism, with tourists actively searching for engaging and participating into cultural learning experiences. Major trends in creative tourism include:

- **Taking home skills as well as souvenirs:** exchange of skills between hosts and visitors, and the production of art, photos or craft objects as souvenirs.
- **Creative gastronomy:** courses and workshops to refine the guests' culinary skills, such as making curry in Thailand.
- **Creative personal space:** retreats or other peaceful surroundings linked to a search for mindfulness, spirituality, including yoga experiences and meditation.
- **Creative work:** co-working spaces and living labs as destinations for travellers who want to combine their work with their passion, which fits with the drive of remote working, the growing number of digital nomads and the increase in “bleisure”³⁵, which refers to travellers who combine business with leisure activities, or leisure travel with business.
- **Digital creativity** (needed for work but also for being able to develop one's own content and share one's life story; offered in major creative cities or attractive settings in nature.
- **Social connectivity:** creative tourism with a more explicit social and relational dimension, such as volunteer programmes directed towards particular forms of creativity useful for community development.
- **Live like a (creative) local** to have transformational authentic experiences; Airbnb allows hosts to provide local experiences, which may include workshops and crafts classes. A transformational experience allows a tourist to understand themselves, others and the world in a new way.

³³ Pine, B.J. and Gilmore, J.H., 2011. *The experience economy*. Harvard Business Press.

³⁴ UNESCO (2006) *Towards Sustainable Strategies for Creative Tourism: Discussion Report of the Planning Meeting for the 2008 International Conference on Creative Tourism*; UNESCO: Santa Fe, NM, USA.

³⁵ Greg Richards et al., 2018, *Creating Creative Tourism Toolkit*, https://perfectlink.co.th/wp-content/uploads/2019/01/Creating-Creative-Tourism-Toolkit_Version-Eng.pdf



- **Holidays for creative professionals**, not only in urban areas but also in creative clusters in rural areas; it requires the presence of trendsetters and coolhunters who can identify and promote new creative experiences.
- **Destinations as hubs of creative networks**, the places to be for specific creative activities and/or knowledge³⁶.

2.3.2 Accessible Tourism

In 2014, an EC study³⁷ defined economic impact and travel patterns of accessible tourism in Europe, starting from the assumption that **accessible tourism is a business opportunity but there is a lack of coordination, particularly between the public and private sector**. Political and financial support, awareness raising and engagement of service providers were identified as important drivers for the tourism business, while reliable information on accessible offers and services were a key factor for success for the guest.

The current tourism demand in 2012 generated €786 billion of gross turnover and €394 billion of GDP, equivalent to **3% of the total EU27 GDP, and 8.7 million persons of employment within the EU**, considering direct, indirect and induced contributions. As of 2011, there were 138.6 million people with access needs in the EU, of which 35.9% were people with disabilities aged 15-64, and 64.1% were the elderly population aged 65 or above. They were not a uniform group, including people who travel with children, people aged 65 and above and people with limitations.

Their population in the EU was anticipated to grow from 138.6 million in 2011 to 154.6 million in 2020. In 2012, in the EU they took approximately 783 million trips within the EU, and the demand was anticipated to grow to about 862 million trips per year by 2020.

People with access needs experience different levels of frequency of barriers when using tourism services. The barriers experienced in the transportation (at the destination) are faced more often compared to other. The study proved that the EU economy could benefit from further contribution under scenarios of minimum, medium and extensive improvements by about 18%, 25% and 36% against the current level, respectively. Recommendations are reported in the table.

Recommendations and success factors	Description
Commitment of the decision-makers	Integration in mainstream offers
	Encourage service providers to invest in accessible tourism and demonstrate its economic and social benefits
	Harmonise standards and legislation to provide better guidance for providers and clearer information for users
	Strong and on-going support from politicians, administrators and decision makers in business – including education and training as well as direct financial support
Coordinating and continuity	Improve the industry's coordination efforts, particularly through public-private partnerships and on local and regional levels
	Assign dedicated work unit or coordinator within the management structure of tourism organisations with appropriate resources
Networking and participation	Encourage knowledge transfer, particularly through professional networks
	Guarantee the accessible offer across all categories of services and prices offered at the destination
Strategic planning	Step 1: awareness of the diversity of access needs and patterns of travel behaviour across different groups and countries, but also across individuals within groups, to target them in the most appropriate way
	Step 2: an inventory of the current offer in terms of infrastructure, services and possibilities for improvement
	Step 3: improve the offer gradually, include accessibility in long-term planning and investments, develop feedback tools for customers to establish accessibility priorities
	Step 4: improve marketing and advertising strategies by taking into account accessibility features
Knowledge management and qualification	Staff with a solid knowledge base on accessibility through good knowledge management
	Regular training of staff and management
Optimisation of resources	Using as many resources as possible for strategic development of accessible tourism
	Prioritising tasks along the service chain
	Include sufficient accessibility information in mainstream tourism information

³⁶ Richards G. (2018). Op. cit.

³⁷ European Commission (2014). Economic impact and travel patterns of accessible tourism in Europe. European Commission, DG Enterprise and Industry



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Communication and marketing

Take personal information and recommendations into account in marketing strategies (e.g. through social media)

Table 10: Recommendations and success factors for the development of Accessible Tourism in Europe

2.3.3 The impact of COVID-19³⁸

Due to the COVID-19 pandemic, which determined an unprecedented fall in demand, global tourism suffered its worst year on record in 2020. International arrivals dropped by 74% from previous year, with destinations worldwide welcoming 1 billion fewer international arrivals.

During the pandemic:

- 90% of the countries closed or partially closed World Heritage Sites during 2020.
- 90% of the world's museums were forced to close at the height of the pandemic in 2020, and more than 10% may never reopen.

Physical distancing and lockdown measures led to the cancellation or postponement of many festive events and rituals around the world, which has raised major social and economic consequences on communities that rely on cultural tourism associated with these intangible cultural heritage practices. Moreover, COVID brought a drastic change in cultural tourist behaviours, as they moved from international well-known cultural hubs to less crowded domestic destinations.

2.3.4 Digital Realities

The types of digital realities are³⁹:

- *Augmented reality (AR)* designed to add digital elements over real-world views with limited interaction.
- *Virtual reality (VR)*: immersive experiences helping to isolate users from the real world, usually via a headset device and headphones designed for such activities.
- *Mixed reality (MR)*: combining AR and VR elements so that digital objects can interact with the real world, means businesses can design elements anchored within a real environment.
- *Extended reality (XR)*: covering all types of technologies that enhance our senses, including the three types previously mentioned.

AR is an enhanced, interactive version of a real-world environment achieved through digital visual elements, sounds, and other sensory stimuli via holographic technology. It incorporates three features: a combination of digital & physical worlds, interactions made in real time, accurate 3D identification of virtual and real objects.

AR offers a better way to design, curate, and deliver digital content in real-world environments, representing an opportunity to offer visitors of CH sites innovative technology guided tours inside museums, exhibits, archaeological areas or across the city. Tours, downloaded both on Mobile and Wearable devices, provide the tourist with content emerging from the context, allowing them to live memorable immersive experiences.

For instance, Inglobe Technologies developed AR-media, a no-code Augmented and Virtual Reality platform that helps create memorable Digital Heritage projects to enhance the visitors experience in the sites⁴⁰. Further examples of AR applied to cultural heritage sites may be consulted in the footnote references⁴¹.

2.4 Key specialized tour operators

There are some tour operators, which are specialized in cultural tourism, while others offer cultural tours among their generic offers. Key international players include Studiosus (German tour operator), which is the main cultural tour operator in Europe¹; ACE Cultural Tours; Classic Journeys; Envoy Tours; Exodus Travels Ltd.; Indigenous Tourism BC; Kudu Travel Ltd.; Martin Randall Travel Ltd.; Nature Quest New Zealand Ltd.; Odyssey World; Responsible Travel; Splitrock Environmental⁴².

³⁸ UNWTO (2020). *Inclusive Recovery Guide – Sociocultural impacts of Covid-19: Cultural Tourism*, <https://www.e-unwto.org/doi/pdf/10.18111/9789284422579>

³⁹ What is augmented reality or AR?, <https://dynamics.microsoft.com/en-us/mixed-reality/guides/what-is-augmented-reality-ar/>

⁴⁰ <https://www.inglobetechnologies.com/augmented-reality-cultural-heritage/>

⁴¹ "ARA as it was", a first of a kind Immersive Augmented Reality experience for Cultural Heritage, <https://www.inglobetechnologies.com/ara-as-it-was-augmented-reality-experience-cultural-heritage/>, Circo Maximo Experience, a project to enhance cultural heritage with Mixed Reality, <https://www.inglobetechnologies.com/circo-maximo-experience-cultural-heritage-mixed-reality/>.

ARmedia Augmented Reality 3D Tracker (Augmenting Rome Coliseum), <https://www.youtube.com/watch?v=WOVjISxhpU>

⁴² Technavio. Op. cit.

2.5 International best practices

2.5.1 Cultural Routes

Cultural Routes of the Council of Europe include 45 Certified Cultural Routes⁴³ reverting on core themes that helped the formation of a shared European cultural identity. In a journey in space and time, cultural routes guide the visitor in the discovery of cultural heritage, which can be related to European history (e.g. European Routes of Emperor Charles V) and civilization (e.g. European Route of Megalithic Culture), arts (e.g. Impressionists Routes) and architecture (Le Corbusier Destinations: Architectural Promenades), religious heritage (Cyril and Methodius Route), common traditions (European Route of Historical Thermal Towns) and intangible heritage (e.g. Roman Emperors and Danube Wine Route).

In the following table, certified routes are displayed:

Routes on history and civilizations	Routes on arts and architecture	Routes on religious heritage
The Hansa (1991)	European Mozart Ways (2004)	Santiago de Compostela Pilgrim Routes (1987)
Viking Route (1993)	TRANSROMANICA— The Romanesque Routes of European Heritage (2007)	Via Francigena (1994)
Routes of El legado andalusí (1997)	European Cemeteries Route (2010)	European Route of Jewish Heritage (2004)
Phoenicians' Route (2003)	European Route of Historical Thermal Towns (2010)	Saint Martin of Tours Route (2005)
VIA REGIA (2005)	ATRIUM— Architecture of Totalitarian Regimes of the 20 th Century in Europe's Urban Memory (2014)	Cluniac Sites in Europe (2005)
Prehistoric Rock Art Trails (2010)	Réseau Art Nouveau Network (2014)	European Route of Cistercian Abbeys (2010)
European Route of Megalithic Culture (2013)	In the Footsteps of Robert Louis Stevenson (2015)	Route of Saint Olav Ways (2010)
Via Habsburg (2014)	Fortified Towns of the Grande Region (2016)	Huguenot and Waldensian Trail (2013)
Roman Emperors and Danube Wine Route (2015)	Impressionisms Routes (2018)	Routes of Reformation (2019)
European Routes of Emperor Charles V (2015)	European Route of Industrial Heritage (2019)	Via Romea Germanica (2020)
Destination Napoleon (2015)	Le Corbusier Destination s: Architectural Promenades (2019)	Cyril and Methodius Route (2021)
Via Charlemagne (2018)	European Route of Historic Gardens (2020)	Routes on landscape and handicrafts Pyrenean Iron Route (2003)
Iron Curtain Trail (2019)	Alvar Aalto Route— 20 th Century Architecture and Design (2021)	Routes of the Olive Tree (2005)
Liberation Route Europe (2019)	European Route d'Artagnan (2021)	Iter Vitis Route (2009)
Aeneas Route (2021)	European Fairy Tale Route (2022)	European Route of Ceramics (2012)
Iron Age Danube Route (2021)	Women Writers Route (2022)	Historic Cafés Route (2022)

Table 11: Cultural Routes of the Council of Europe

2.5.2 The Great Silk Road

The term “silk road” was first used by German geographer Ferdinand von Richthofen in 1877. The term marked the trade path that linked the ancient Rome with China. Nowadays the term “silk road” is used to mark all the roads that were used for trade between East and Europe.

In addition to silk, a wide range of other goods was traded along the Silk Road, and the network was also important for migrants and travellers, and for the spread of religion, philosophy, science, technology and artistic ideals. The Silk Road had a significant impact on the lands through which the routes passed, and the trade played a significant role in the development of towns and cities along the Silk Road routes.

⁴³ Certified Cultural Routes of the Council of Europe, <https://rm.coe.int/booklet-for-member-states-eng-2023-def/1680a80ab8>



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The Silk Road started to be used just after the invasions of Alexander the Great, when the East and West collided in Middle East and India. At first it was used to export silk from China, and this is why it was called “The Great Silk Road”.

Armenia on the Silk Road

Needless to say, Armenia played a huge role for East and West at that time. From the East the Silk Road passed through Armenia, or rather, through the Artashat city and from there stretched to the harbors of the Black Sea. In the 5th century Dvin came to replace Artashat as the capital of Armenia. The trade road that linked China, Central Asia and Iran with the capital of Byzantine Empire Constantinople passed through Dvin. In the 9-10th centuries Armenian towns **Artsn, Ani and Kars** played an essential role in world trade. Later many samples of Persian pottery, silk and china were found during the excavations in Ani.

Till now in Vayots Dzor Province of Armenia the ancient Orbelians’ caravanserai was preserved, which once served as an inn for traders who passed through Armenia along the Silk Road.

The Great Silk Road played a great role between the East and the West. It was not just a trade road but it was a cultural, religious, linguistic and technological bridge for exchanges and enriched the culture of all participant countries.

What kept the Armenian culture and traditions alive and thriving was the ethereal Armenian innovative spirit, shaped and perfected on the crossroads of civilizations and hugely contributing to the development of humankind. This is probably the biggest benefit Armenia had received from its role as one of the oldest nations on the Great Silk Road⁴⁴.

2.5.3 Creative Tourism practices in developing countries

Practices of creative tourism are various and range from making curry in Thailand to dyeing textiles in Guatemala, or dancing music in Brazil to the rhythm of *samba*, *milonga*, *chamamé* and *chacarera*. During such a holiday trip, tourists encounter a different culture thanks to creative travel programmes allowing them to get in touch with local people, culture and creativity, which allow tourists to bring back home souvenirs that they made themselves, promoting the culture to the tourists’ peers.

Creative travel programmes lead to more opportunities for local people to acquire knowledge and skills and to earn an income, as they are usually carried out by locals, also in the role of inbound tour operator or “ground operator”. An example is the wide variety of round trips offered focusing on the “Maya Textile Route” in Guatemala, during which cultural visits of cities and museums are combined with weaving and dyeing workshops. During these workshops visitors learn how to create their own fabrics in the traditional brightly coloured threads of the “land of eternal spring”. Further examples can be found in the footnotes⁴⁵.

Other remarkable practices are:

- **National programmes.** For example, **Designated Areas for Sustainable Tourism Administration (DASTA)** promoted by the Thai government. It is based on the idea that Thai culture is unique and that unique forms of creativity are linked to it. 20 different villages were designated to offer a unique taste of Thai culture for visitors, rooted in the local involvement, with each being linked to a particular craft or skill that demonstrates Thai creativity. As part of the project a [toolkit](#) was provided which offers a step-by-step guide to developing creative tourism.
- **Exchange networks**, such as Recria Brasil in Brazil where local people and businesses use platforms such as AirBnB to sell experiences, which allows to establish a direct connection with the tourist in exchange for a small fee. To such extent, the international Creative Tourism Network⁴⁶ is a great example of collaboration across country borders. Such organization provides examples of creative tourism in various countries allowing people to become members and developed a “creating creative tourism toolkit” that is accessible online⁴⁷.

⁴⁴ Source: [The Great Silk road](#)

⁴⁵ Tours offered by Haute Culture Fashion or ArtGuat, the Blue Yonder, a tour operator in India, provides various options, including musical trails, gastronomic trails, local encounters, cultural heritage, and city breaks; Feynan Ecolodge in Jordan, which is an example of an accommodation promoting the rich Bedouin culture of the region, and exploring local archaeological sites.

⁴⁶ <http://www.creativetourismnetwork.org/>

⁴⁷ In Europe CreaTour offers an inspiring example of a creative tourism network. It is intended as an incubator/demonstration initiative to catalyse creative tourism in small cities and rural areas throughout Portugal. Its website gives an overview of inspiring best practices in Portugal, with a prize-winning documentary about creative tourism development in small cities and rural areas also available.



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2.5.4 Improved Accessibility to CH

The already mentioned EU study about accessible tourism⁴⁸ provides several good practices for developing the sector, including national accessible websites (Visit England), accessible cultural tours, transportation and accommodation. Furthermore, now good practice includes Parque de Sita in Portugal, Prado Museum in Spain and specialized EU guides, which can be consulted in the boxes.

Parque de Sintra

It is a Portuguese cultural site which is currently implementing the "Parques de Sintra Welcome Better" project, which seeks to raise the standards of access to the properties under its management.

This project, involving overall investment in the region of €2 million, with 25% co-financing from Turismo de Portugal, took as its point of departure research into the current state of global practices and to this end drawing on various national associations of relevance to this theme, in particular ACAPO (the Portuguese Association of the Blind and the Partially Sighted), APS (the Portuguese Association of the Deaf) and the Salvador Association, with a protocol signed with each entity. This also led to the recruiting of a grant holding doctoral degree student to carry out research into best practices, analyse case studies and the different products available in the global marketplace. Hence, this correspondingly defined the best strategy and selected the best options in accordance with the intended impacts and outcomes.

This project spans three different dimensions to access:

- Physically, improving the mobility conditions providing autonomous and safe visit to all with physical adaptations to the outdoor and interior environments and the acquisition of new equipment;
- Information, improving communication and irrespective of visitor characteristics;
- Services, providing more and better services catering to diversified publics including persons with deficiencies and guaranteeing a more effective level of cultural knowledge transmission.

In addition to the partnerships established with the already mentioned Portuguese associations, Parques de Sintra also became a member of the European Network for Accessible Tourism (ENAT). The main mission of this institution involves rendering European tourism destinations and their respective services accessible to all visitors, making available techniques and sharing information and generally striving towards meeting the commitment towards equality of opportunity in the access to tourism and culture. Parques de Sintra also became a member of the Acesso Cultura Association at the end of 2014.

The company's commitments to Social Responsibility also reflects in its pricing policy with a 70% reduction in the ticket price for registered disabled persons at the Convent of the Capuchos and the National Palace of Sintra with a 50% discount prevailing at other Parks and Palaces. Persons requesting such discounts should always present on request an appropriate form of identification. Whenever strictly necessary and duly justified, the person accompanying a visitor with some type of disability enters free of charge.

Prado museum

It is adapting six masterpieces so that the blind can "visualize" them in the "Today Prado Touches" exhibition. Through touch, visitors appreciate the different textures and volumes with which these reproductions were created. Velazquez, Goya, Da Vinci, El Greco, Van der Hamen and Correggio are the artists selected for this free exhibition for the blind.

T-GUIDE project: "Tourist Guides for People with Learning and Intellectual Difficulties in Europe".

It allowed over 50 professional tourist guides in Europe to be qualified by FEG and ENAT as "T-Guides", who are trained to guide persons with learning difficulties at heritage sites. T-GUIDE aims to enable all visitors, regardless of an intellectual or learning difficulty, to have an enriching and meaningful tourism experience by taking part in a professionally guided tour.

2.6 The Cultural and Heritage Tourism value chain

2.6.1 The value chain concept

According to the approach recommended by the UNWTO⁴⁹, a tourism product should encompass a range of services that include primary and foundation activities. These represent the **tourism product value chain**, which shall be tailored to address the specific needs of segments of the tourism demand.

⁴⁸ European Commission (2014). Op. Cit.

⁴⁹ UNWTO (2007). *A Practical Guide to Tourism Destination Management*. Madrid



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Each tourism product ideally owns its value chain, consisting of **primary and foundation activities**. These are partly peculiar to certain tourism products and partly shared with other products.

PRIMARY ACTIVITIES	Product development	Destination and product packaging	Promotion	Distribution and sales	In and outbound logistics	Destination operations and services	Aftercare
	<ul style="list-style-type: none"> New airline alliances and destinations Development of environmental and cultural resources Upgrading and development of visitor services and facilities Exploiting new markets and market segments New routes, themes, hub/spokes and itineraries -Quality (standards) management and assurance systems Improved service delivery and visitor management 	<ul style="list-style-type: none"> Producing marketing materials Collectively packaging attractions of cities, areas and regions Negotiating commission and pricing contracts with suppliers Wholesale packaging 	<ul style="list-style-type: none"> Consumer advertising, PR and promotions Trade exhibitions, workshops, sales visit Marketplace representation Familiarisation trips Media liaison/educational 	<ul style="list-style-type: none"> Enquiry and info mail service Distributing destination information Brochure display Tour operators alliances Retail (travel agency) sales E-business Reservations Payment and ticketing Insurance Seat pricing and scheduling 	<ul style="list-style-type: none"> Visa and passport provision Airport facilities and services VAT reclaim Emigration services Check in and gate operation Baggage handling In-flight services 	<ul style="list-style-type: none"> Airport transfers Taxi services Public transport Visitor centres Accommodation Catering Tours Attractions Car rentals Entertainment Health and beauty Sport and recreation 	<ul style="list-style-type: none"> Database management Consumer and client tracking and feedback Industry feedback and follow-up

FOUNDATION ACTIVITIES	Destination planning and infrastructure	Public transport systems, roads, airports, rail, ports, public toilets, etc.	Bulk infrastructure telecoms, water, electricity, recreation, etc.	Destination planning, design, layout and land-usage	Energy, water and resource management	Aesthetic, environmental and social quality enhancement	Safety and security management	Road signage, information networks and other navigation	Public/private partnerships, strategic alliances, mergers and acquisitions	Institutional coordination and business deregulation
	Training and skills development	Community tourism awareness and acceptance	Skills training and education.	Personnel management – recruitment, motivation, incentives, etc.	Customer care, hospitality culture	Career pathing, staff development, staff stability	Labour relations and negotiations	Job creation and intensifying projects		
	Technology and systems development	Computerised reservation systems	Market research and intelligence	Management systems and procedures	Security systems	Information systems and communication				
	Related industries and procurement	Equipment and component supplies	Fuel, food and beverages	Contracted services	Professional services	Other services	Real estate/buildings			

Figure 2: Components of the tourism product

The value chain concept is not only helpful for providing a better tourism service, but also for promoting the diffusion of economic and employment benefits throughout the local economy. This is particularly relevant for the cultural and heritage tourism products, as they normally present several connections to a wide array of sectors, including high-tech ones⁵⁰.

Destinations that have at work a cultural value chain are known as “**cultural districts**”.

Cultural districts are defined as well-recognized, labeled areas of a city in which a high concentration of cultural facilities and programs serve as the main anchor of attraction. They help strengthen local economies, create an enhanced sense of place, and deepen local cultural capacity⁵¹.

2.6.2 Primary Activities for Cultural and Heritage Tourism

Primary activities are the core business of public and private tourism actors and involve the packaging, promotion and delivery of the tourism experience to the visitor. They include the followings:

- **Product development.** It ensures constant rejuvenation of the destination supply. It includes cultural attractions and activities that provide the major reasons for travelers wanting to visit and experience the destinations and plants such as accommodation, catering and transportation which are mainly developed in support of the attractions and activities and does not usually act as a primary travel motivator. It is of utmost importance that the attractions and activities are constantly improved and expanded in accordance with new trends and developments in the marketplace.

► *In Armenia, the cultural-heritage tourism product might be developed based on the good international practices already mentioned: digitalization, accessibility, family friendly, creative tourism, etc. The country*

⁵⁰ Valentino, P.A., Musacchio, A. and Perego, F., 1999. *La storia al futuro: beni culturali, specializzazione del territorio e nuova occupazione*. Giunti, Firenze

⁵¹ See, for instance, <https://www.americansforthearts.org/by-program/reports-and-data/toolkits/national-cultural-districts-exchange-toolkit#:~:text=Cultural%20districts%20are%20defined%20as,and%20deepen%20local%20cultural%20capacity.https://crownschool.uchicago.edu/cultural-districts-and-potential-urban-development>

already experienced some works done towards digitalization of cultural sites by making virtual tours, 3D modelling, which may be seen in the footnote citation⁵².

- Besides, the country should walk towards creative tourism by shifting the traditional cultural tourism to more creative, experience-based activities. Moreover, all touristic sites should start to be accessible for people with disabilities.

- **Destination and product packaging.** The intangible tourism product should be packaged as conveniently, attractively and accessibly as possible. Packages consist of a range of attractions and activities, experiences, products and services that are offered according to themes, suggested itineraries or geographical locations.

From international best practice we may mention a practice to manage hotel widespread accommodation in small cultural town. The *Albergo Diffuso* is a recent concept in Italy and Europe, tracing back to the idea of using restored houses for tourism with the funds allotted after the earthquake in Friuli region (1976), being firstly formally acknowledged in Sardinia with a specific regulation in 1998. The diffusion of such hospitality formula is due to the growing concern about sustainability and respect for the environment in the travel industry. The natural location of an *albergo diffuso* can be found in little historical towns or countryside and mountain villages. In the case of peculiar locations, different types of hotels are also associated⁵³.



Figure 3: The albergo diffuso in the village of Santo Stefano di Sessanio, Abruzzo, Italy

Another good practise is personalization of tourism cultural products. For example, in Perugia –a charming middle-ages Italian city much related to chocolate production - a Chocohotel was opened. In the 3-star hotel, tourists will find sweets and delicacies: it's the first hotel in the world dedicated to chocolate! It offers **experiences** that revolve around chocolate, such as *Choco Breakfast* (discover the *Glutton Island*, the sweetest - and most photographed - buffet tourists can find). The 94 rooms of the hotel are divided into three peculiar floors: milk, gianduia and dark chocolate. Moreover, the hotel is located in a convenient location, just five minutes by car from the historic centre of Perugia, the city that is the queen of chocolate⁵⁴!



Figure 4: Chocohotel in Perugia, Italy

- By the above-mentioned examples in Armenia it might be considered the creation of “albergo diffuso” in villages, while also connecting cultural assets with local products, for example create “Apricot hotel”, etc.

Cultural-heritage tourism needs better packaging including tangible and non-tangible cultural assets.

- Armenia might consider developing international religious routes to the monasteries of first Christian nation (for example Route to Edjmiadzin). It may also start-up specialized touristic products based on arts and music, including the organization of thematic festivals of different arts and crafts, Armenian national music and dances. Silk road has another significance and its possibility should also be considered. Armenian

⁵² <https://360stories.com/armenia>,

<https://sketchfab.com/tags/armenia>

⁵³ <https://www.alberghidiffusi.it/?lang=en>

⁵⁴ Find the magic of chocolate at Chocohotel, <https://www.chocohotel.it/en/>



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diaspora is the direct target market for such touristic products as ethnic tourists who will come to their historical country.

- **Promotion.** The destination needs to be promoted to the marketplace either directly to the consumer or to the intermediaries (travel agents and tour operators) using a range of promotional methods. Consumer marketing is selling goods or services to individuals for their personal use and promoting these goods and services through various marketing strategies, including using consumer data for personalized experiences⁵⁵. Emerging trend in consumer marketing is the role of B-loggers, V-loggers with the widespread use of Internet. Many V-loggers today use Tik-Tok, Instagram, Facebook, etc. to show their ads on cultural sites. Here It may be mentioned as a good example the practice of Denmark, the site about 1001 *fantastic cultural heritage sights in Denmark*⁵⁶.

By the expansion of internet tourists are increasingly make tours by themselves, without using the services of tour companies, visiting trade shows, etc. So, consumer marketing should be widely used taking advantage one new low-cost tools and methods.

- ▶ *Armenia might consider to promote more by using SMM, especially by Armenia.travel portal pages in social media and taking advantage of "informational-psychological war" methods. Good marketing methods would here include viral marketing, word of mouth marketing, influencer marketing.*

- **Distribution and sales.** Generic and commercial information should be distributed through the most appropriate channels. These include destination websites, consumer enquiry lines, mailing services, brochure display facilities, retail travel agency networks, mixing trade and consumer marketing. Trade marketing is a strategy focused on wholesalers, retailers and distributors rather than consumers, with the goal of increasing demand with supply chain partners and getting products in front of consumers. Common trade marketing activities include going to trade shows and offering promotions to potential partners⁵⁷. Another good practice is organization of fam-trips, press tours, educational tours for international B-loggers and V-loggers, journalists, representatives of international tour companies.

- ▶ *Trade marketing methods are most low-cost and might be conveniently used for promoting cultural and heritage tourism towards Armenia by implementing a trade marketing plan based on fam trips and press tours.*

- **In and outbound logistics.** Ease and speed of access is essential for visitor choice. Choices to visit can be influenced by convenience factors such as availability and cost of flights, visa and passport provision, airport facilities and services, VAT reclaim facilities, emigration services, check in and gate operation, baggage handling, in-flight services, seat pricing and scheduling, etc.

- ▶ *Armenia has without visa regime with many countries; therefore, in and outbound logistics is easy, although access is limited as the only viable ground borders are versus Georgia and Iran and the unique airport access is at Yerevan and Gyumri.*

- **Destination operations and services.** The largest part of the tourist experience happens at the destination and this has a determining effect on the enjoyment levels and value experienced. These include all aspects of the tourists visit including transfers, taxis and public transportation, visitor services and centres; accommodation, food/catering, tours, attractions and activities, car rentals, entertainment, health and beauty services, sport and recreation, etc.

Usually there are problems with transportation, with tourists more satisfied with accommodation but complaining with taxis and particularly public transportation, especially at intermodal hubs.

- ▶ *Armenian cultural and heritage product development would take advantage by starting prototype programs addressing accessibility problems for tourists with limitations, thus catering to the needs of such increasing market segments. As well, it might use cultural features to promote the diffusion of boutique, wine, or local-products inspired accommodation, as well as by sustaining the spread of scattered hotels, particularly in villages nearby cultural sites.*

- **Aftercare.** Client care and follow-up is essential to establish loyalty and positive attitudes among clients. Aftercare services include establishing, managing and maintaining client databases, tracking consumer attitudes and profiles and conducting feedback and follow-up programme. Some facilities receive feedback and try to solve any problem risen by tourists.

- ▶ *A survey done in 2019 shows that both foreigners and Armenians from diaspora come **mainly for cultural purposes**. 67% of the tourists who participated in the survey left Armenia with 1 positive impressions, left as a potential promoter of the country, and 47% were 1 repeat visitors⁵⁸.*

⁵⁵ <https://business.adobe.com/blog/basics/consumer-marketing>

⁵⁶ 1001 stories of Denmark, http://www.kulturarv.dk/1001fortaellinger/en_GB

⁵⁷ <https://www.gartner.com/en/marketing/glossary/trade-marketing>

⁵⁸ Tourism Development Strategy of the Republic of Armenia, Draft, Preliminary Analysis, https://mineconomy.am/media/12644/HAVELVAC_3.pdf



- ▶ Another survey was done by an individual researcher in Armenia, among 385 incoming tourists using a questionnaire developed by the author. The author calculated Customer Satisfaction Score (CSAT), which was 91, which shows that 91% of tourists were satisfied with their trip. Net Promoter Score (NPS) was 80, which means that 80% of surveyed tourists would recommend their friends to visit Armenia⁵⁹. However, there are no National surveys about visitor satisfaction at cultural sites, which might be considered, also through cooperation with universities.

2.6.3 Foundation Activities for Cultural and Heritage Tourism

Foundation Activities include support activities (destination planning and infrastructure, training and skills development, technological and systems development, related industries and procurement), which help increasing the efficiency of the primary value chain and/or increasing the economic and social impacts of tourism development.

These activities are those where the value delivery is indirect and supports the visitor experience e.g. infrastructure, planning, human resources development, technology and related industries such as construction, retail, etc. The provision of these foundation activities is especially challenging, since they are delivered by a range of public and private agencies that do not have tourism as their core businesses.

The destination must live up to its brand promise, otherwise there will be high levels of dissatisfaction. Ensuring these foundation activities are in place requires strong leadership from the DMO. Such delivery can only occur within the framework of public/private partnerships and strategic alliances and effective institutional coordination among the various players in the value chain.

These activities include:

- **Destination planning and infrastructure.** The physical image, environment integrity and infrastructure of the destination are key determinants of the quality of the visitor's experience. The industry is not be able to function without an appropriate and operational transportation network (e.g. public transport, roads, airports) as well as bulk infrastructure (telecommunications, water, electricity, recreation and access to communication channels). The threat of diseases such as COVID 19, etc. puts also pressures on destinations to provide high quality basic infrastructures and services.
- ▶ *Armenia's cultural sites sometimes suffer transportation network problems, with some destinations having problems with bulk infrastructures as well. A prioritization of interventions should be considered according to the sites' strategic relevance.*
- **Training and skills development.** Tourism is a service industry and the quality of the visitor experience is largely determined by the quality of service and personal interaction experienced at the destination. Therefore, the development of quality interactions with the people tourists encounter at the destination is an important element of the tourism value chain.
- ▶ *Armenia lacks specialized tour guides in cultural-heritage tourism, along with guides who will be able to work with people with learning difficulties. This also reminds to the necessity to enforce capacity building actions at different levels, starting from professional school and University education in culture and tourism, but including also private operators and NGOs involved in cultural and heritage tourism.*
- **Technology and systems development.** Technology has become a driving force in support of the tourism value chain. Internet based reservation services have revolutionized the concept of online reservations by providing access to a far greater number of destination product. Operational and management information systems are also of major importance. Augmented reality and virtual reality have also revolutionized the way cultural and natural Attractions and activities are promoted.
- ▶ *AR/VR is lacking at most Armenian cultural sites. It might help to experience historical events that surrounded their birth and development, adding much value to the tourism visits. As diaspora is a major heritage tourism driver, it might deserve well designed applications. AR/VR would also be helpful in supporting the valorization of cultural itineraries, by introducing QR-Code and beacon-based applications.*
- **Related industries and buying local produce.** Primary tourism industry activities such as accommodation, transportation, catering, entertainment and recreation are underpinned by a wide range of related enterprises that supply services to primary tourism sectors. These are an integral part of the tourism "cluster" and the success of the value chain is highly dependent upon the effective provision of these services and products, which also help to spread economic and social impacts. These include equipment and component supplies, fuel, food and drink, contracted services, professional services, real estate/buildings, etc.

⁵⁹ Tovmasyan G, ARMENIA IN THE EYES OF A TOURIST, <https://asue.am/amberd/publication/analytics/armenia-in-the-eyes-of-the-tourist-1>



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- *The adoption of the cultural tourism district concept would help to fully include local operations in the value chain. This means the involvement of local artisans in restoration and valorization, the use of local best gastronomic products in bars and restaurants, the introduction of a quality museum merchandising designed by best Armenian artists.*

3. THE CURRENT SITUATION OF CULTURAL AND HERITAGE TOURISM IN ARMENIA

3.1 Cultural and Heritage Tourism Supply

3.1.1 Tangible and intangible cultural heritage

Armenia has an ancient history. It lies in the highlands surrounding the Biblical mountains of Ararat. Hayk (the legendary ruler of Armenia) created the Armenian nation in the Ararat region in 2300 BC. The Book of Genesis identifies the land of Ararat as the resting place of Noah's Ark after the "great deluge" described there. Such **outstanding heritage still does not correspond to coherent positioning in the travel and tourism international arena**. According to *the Travel & Tourism Development Index 2021* published by the World Economic Forum, Armenia was at the 61st place among 117 countries⁶⁰:

Item	Nr	Ranking
WH cultural sites	3 sites	55th
Oral and intangible cultural expressions	7	29th
Large sports stadiums	1	82nd
Cultural and entertainment tourism digital demand entertainment	0-100 best	71st
UNESCO Creative cities	0	70th
Protection for tangible and intangible CH	3,7	89th

Table 12: Armenia C&H resources ranking in the Travel & Tourism Development Index 2021

Besides the three properties currently inscribed on the WHL of UNESCO from Armenia, there are four other properties submitted on the Tentative List⁶¹. Nevertheless, there are not created routes to these monasteries as religious routes.

- *In 3.5 paragraph it is mentioned that in 2017 The "Pilgrimage to the first Christian country" strategy project was developed by the Tourism Committee of the Ministry of Economy of the Republic of Armenia, which was not adopted. By that strategy, some pilgrimage routes were decided to create, which is a necessary step to be done.*

The intangible cultural heritage of RA is also of great importance for the development of historical and cultural tourism. On March 20, 2006, Armenia became a member of UNESCO's "Protection of Intangible Cultural Heritage" convention 2003.

- *Currently in the list of UNESCO's Intangible Cultural Heritage of Humanity are included the following elements from Armenia, which should be considered for main events targeting international tourism.*

- *Duduk and its music, 2008;*
- *Armenian cross-stones art. Symbolism and craftsmanship of Khachkars, 2010;*
- *Performance of the Armenian epic of "Daredevils of Sassoun" or "David of Sassoun", 2012;*
- *Lavash, the preparation, meaning and appearance of traditional bread as an expression of culture in Armenia, 2014;*
- *Kochari, traditional group dance, 2017;*
- *Armenian letter art and its cultural expressions, 2019;*
- *Pilgrimage to the St. Thaddeus Apostle Monastery, 2020, Iran (Islamic Republic of) – Armenia⁶².*

In 2010 by the decision N 310-A of March 11, the Government of the RA approved the *"Standards for Compilation of Lists of Intangible Cultural Values of the Republic of Armenia and the List of Intangible Cultural Heritage Values"*⁶³, by which the process of recording and studying the situation of intangible cultural heritage in the territory of the Republic of Armenia began, and also the first list of intangible cultural heritage values was approved, which at that time consisted of 24 values, and currently it includes 45 values. Such value area

⁶⁰ The Travel & Tourism Development Index 2021, <https://www.weforum.org/reports/travel-and-tourism-development-index-2021/explore-the-data>

⁶¹ They include the archaeological site of the city of Dvin (1995); the basilica and archaeological site of Yererouk (1995); the monastery of Noravank and the upper Amaghov Valley (1995); the monasteries of Tatev and Tatevi Anapat and the adjacent areas of the Vorotan Valley (1995). Source: Properties inscribed on the World Heritage List, Armenia, URL: <http://whc.unesco.org/en/statesparties/am>

⁶² Representative List of the Intangible Cultural Heritage of Humanity of Armenia, [https://ich.unesco.org/en/lists?country\[\]=00014&multinational=3&display1=inscriptionID#tabs](https://ich.unesco.org/en/lists?country[]=00014&multinational=3&display1=inscriptionID#tabs)

⁶³ "Standards for compiling the lists of intangible cultural values of the Republic of Armenia and the list of intangible cultural heritage values", Government of the Republic of Armenia, Appendix 2 of the decision N 310-A of March 11, 2010. <https://www.arlis.am/DocumentView.aspx?docid=105428>

N 599-A decision of the Government of the Republic of Armenia of April 15, 2021 on making an addition to the decision N 310-A of March 11, 2010 of the RA Government, <https://www.arlis.am/DocumentView.aspx?docid=151785>



reported in Annex 1.

By the decision N 36-N of the Government of the Republic of Armenia of January 20, 2011, the "Standards for compiling the lists of intangible cultural heritage of the Republic of Armenia in need of immediate protection and the list of intangible cultural heritage values compiled on their basis" was approved, which consisted of 7 values⁶⁴, which were augmented in 2019⁶⁵.

► *Such values might allow for community-tourism valorization promoting summer courses and other experiences. There might be some incentives for celebrating festivals, such as an annual "Armenian folk and craft festival". The values should be used as a mean of creative tourism as well, when tourists may shift from traditional cultural tourism to experience-based creative tourism.*

Moreover, cultural areas were recognized by the decision N 241-N of March 1, 2012, of the Government of the Republic of Armenia, which approved "The criteria for recognition of RA cultural areas and the list of cultural areas". Currently, the list includes the following areas:

- the village of Areni in the Vayots Dzor Marz of the RA, on both sides of the downstreams of Arpa River (formerly Arpa);
- the city of Gyumri in the Shirak Marz of the RA (formerly Kumayri, Aleksandrapol, Leninakan);
- the city of Meghri in the Syunik Marz of the RA (former name Arevik province);
- Ashnak village in Aragatsotn marz of the RA;
- Goris city in Syunik marz of the RA;
- Khachik village in Vayots Dzor marz of the RA;
- Verin Dvin village in Ararat marz of the RA⁶⁶.

► *Tourism cultural development strategies for such areas should follow a twofold approach. First, a government effort is advised to promote the creation of a **cultural district in each area**, based on widespread scattered accommodation such as the example of "Alberghi diffusi", valorization of typical arts and crafts, creation of visitor centers, etc. – all these possibly being managed and promoted under a unique "umbrella", such as that provided by a local DMO. Secondly, such cultural areas should be included in **national tourist routes**, by valorizing very peculiar aspects so that to preserve key cultural values. Such strategy should encompass the valorization of key events. It might be considered, for example, during different types of festivals, to organize performances of national dances - kochari and yarkhushta, demonstrations of khachkar mastery, embroidery, demonstrations of how to bake lavash in tonir, how to make gatha, performance of tightrope dancing, etc. This might be extended to the organization of thematic festivals, such as the grand celebration of the church holidays of Saint Sargis, Terendez, Vardavar, which can contribute to the growth of both domestic and inbound tourism.*

3.1.2 Historical and cultural sites

According to the data provided by the Ministry of Education, Science, Culture and Sports of the RA there are **24,225 historical and cultural monuments in the RA** as of 2020 (table 12⁶⁷):

Place	No. of immovable monuments of history and culture	No. of monuments according to the main list of the region	No. of monuments according to 2007 state list
Yerevan	996	977	19
Aragatsotn	1,829	1,796	33
Ararat	906	906	0
Armavir	420	420	0
Gegharkunik	5,277	5,270	7
Lori	3,046	3,045	1
Kotayk	3,208	3,208	0
Shirak	2,349	2,349	0
Syunik	2,818	2,812	6
Vayots Dzor	1,380	1,373	7
Tavush	1,996	1,996	0
Total, RA	24,225	24,152	73

⁶⁴ "Standards for compiling the lists of intangible cultural heritage in need of immediate protection of the Republic of Armenia and the list of intangible cultural heritage values compiled on their basis", Appendix 2 of the decision N 36-H of January 20, 2011 of the Government of the Republic of Armenia., <https://www.arlis.am/DocumentView.aspx?docid=65356>

⁶⁵ Annex to Decision N 1825-N of November 4, 2021 of the Government of the RA on making additions to the decision No. 36-N of January 20, 2011 of the Government of the Republic of Armenia, <https://www.arlis.am/DocumentView.aspx?docid=157496>

⁶⁶ No. 241-N decision of March 1, 2012 of the Government of the Republic of Armenia on approving the "Criteria for the Recognition of Cultural Areas of the Republic of Armenia and the List of Cultural Areas", <https://www.arlis.am/DocumentView.aspx?docid=134827>

⁶⁷ The information was provided by the Ministry of Education, Science, Culture and Sports of the RA, the data is based on the calculations of the Research Center of Historical and Cultural Heritage.



Table 13: State inventory of immovable monuments of history and culture by RA marzes and Yerevan city, 2020

3.1.3 Museums

In 2020 there were **100 museums in Armenia**, 63 of which were in Yerevan (table 13⁶⁸):

Place	Total	Historical	Geographical	Of which by sort Memorial	Literature and art	other
Yerevan	63	21	1	9	31	1
Aragatsotn	1	-	-	1	-	-
Ararat	2	-	-	1	1	-
Armavir	3	2	-	1	-	-
Gegharkunik	2	-	2	-	-	-
Lori	8	4	1	2	1	-
Kotayk	5	2	1	1	1	-
Shirak	8	1	1	6	-	-
Syunik	4	2	2	-	-	-
Vayots Dzor	1	-	1	-	-	-
Tavush	3	2	1	-	-	-
Total, RA	100	34	10	21	34	1

Table 14: Number of museums by marzes of RA and Yerevan city, 2020 unit

Due to Covid-19, number of visitors to museums in 2020 collapsed to 704,175 people, down from 2,366,115 of previous year. 93% of which were in Yerevan⁶⁹. Prior to 2020, the number of museum visitors however increased constantly, as in 2019 increased by about 13% vs. 2014 (tables 14⁷⁰).

Place	2014	2015	2016	2017	2018	2019	2020
Yerevan	1 882 591	2 043 720	2 050 477	2 529 508	2 631 609	2 093 821	657 615
Aragatsotn	5 412	6 987	5 412	6 987	8 875	11 000	1 287
Ararat	20 425	18 959	20 460	18 886	18 164	25 870	2 779
Armavir	39 479	42 362	33 664	38 657	57 361	38 569	3 377
Gegharkunik	3 534	3 181	3 003	3 237	3 244	5 116	2 444
Lori	24 142	28 978	26 361	22 670	32 421	54 035	6 610
Kotayk	12 893	14 000	13 844	8 901	15 608	17 170	7 897
Shirak	86 225	86 137	107 205	112 663	131 201	85 110	15 618
Syunik	9 488	10 082	10 082	8 507	11 049	18 488	1 973
Vayots Dzor	1 160	831	789	1 339	989	3 159	175
Tavush	6 058	6 115	5 240	6 789	11 043	13 777	4 400
Total, RA	2 091 407	2 261 352	2 276 537	2 758 144	2 921 564	2 366 115	704 175

Table 15: Visitors to museums by regions of the Republic of Armenia and to the city of Yerevan, 2014-2020, people

3.1.4 Libraries

In 2020 there were **3 republican and 661 public libraries in Armenia** with a book fund of 17.7 million ⁷¹.

3.1.5 Theaters

The number of theaters in 2020 was 26 with 196,3 thousand visitors compared to 565.5 thousand visitors in 2019 (table 14)⁷². Unfortunately, it is not calculated separately what percentage of visitors to museums or theaters are inbound tourists of RA.

Year	2014	2015	2016	2017	2018	2019	2020
Theaters (including)	28	28	28	28	28	26	26
Opera and Ballet	1	1	1	1	1	1	1
Drama, comedy and musical	20	20	20	20	20	18	18
Children and youth	6	6	6	6	6	6	6
Puppet theaters	1	1	1	1	1	1	1
Annual attendance (during the year), 1000	480.3	512.7	526.1	575.2	564.1	565.5	196.3

Table 16: Number of theaters in the RA, 2014-2020

⁶⁸ Social situation in RA for 2020, p. 567, https://armstat.am/file/article/soc_vich_2020_e_24.pdf

⁶⁹ Social situation in RA for 2020, p. 577-578, https://armstat.am/file/article/soc_vich_2020_e_24.pdf

⁷⁰ Social situation in RA for 2017, p. 557, https://www.armstat.am/file/article/soc_vich_2017_25.pdf

Social situation in RA for 2019, p. 587, https://www.armstat.am/file/article/soc_vich_2019_e_25.pdf

Social situation in RA for 2020, p. 577, https://armstat.am/file/article/soc_vich_2020_e_24.pdf

⁷¹ Social situation in RA for 2020, p. 514, https://www.armstat.am/file/article/soc_vich_2020_e_18.pdf

⁷² Statistical Yearbook of Armenia, Education and Culture, 2019, p. 151, <https://www.armstat.am/file/doc/99516753.pdf>

Statistical Yearbook of Armenia, Education and Culture, 2021, p. 178, <https://www.armstat.am/file/doc/99526838.pdf>



3.1.6 Religious structures

Religious travel is a key cultural driver to Armenia, as **it was the first nation to adopt Christianity as a state religion (301AD)**. According to tradition, the Armenian Church was founded by two of Jesus' twelve apostles - Thaddeus and Bartholomew, who preached Christianity in Armenia between 40-60 AD.

Because of these two founding apostles, the official name of the Armenian Church is **Armenian Apostolic Church**. According to the data provided by the Ministry of Education, Science, Culture and Sports of the RA, there are 1475 churches and 610 chapels in the Republic of Armenia. The total number is 2,444⁷³.

Type	Yerevan	Aragatsotn	Ararat	Armavir	Gegharkunik	Lori
Courtyard	2	10	5	2	12	10
Matenadaran	-	-	-	-	-	2
Church	18	157	78	43	157	234
Bell tower	1	5	3	4	3	25
Altar	-	3	-	-	-	-
Liturgy place	-	-	-	-	-	2
Chapel	3	56	20	3	90	127
Mosque	3	1	-	-	-	-
Treasury	-	-	-	1	-	-
Sanctuary	-	-	-	-	-	5
Monastic complexes	-	5	3	-	6	17
Temple	3	-	-	2	-	-
Tomb	-	1	2	-	-	2
Cave-pilgrimage place	1	-	-	-	-	3
Total	31	238	111	55	268	427

Type	Kotayk	Shirak	Syunik	Vayots Dzor	Tavush	Total
Courtyard	13	5	18	12	21	110
Matenadaran	1	-	-	-	1	4
Church	163	158	225	87	155	1475
Bell tower	16	15	4	1	3	80
Altar	2	4	-	-	-	9
Liturgy place	1	1	-	-	2	6
Chapel	100	48	39	39	85	610
Mosque	-	1	1	-	-	6
Treasury	-	-	-	-	1	2
Sanctuary	8	2	3	-	3	21
Monastic complexes	14	7	12	13	17	94
Temple	4	2	-	-	1	12
Tomb	-	-	-	1	2	8
Cave-pilgrimage place	2	-	1	-	-	7
Total	324	243	303	153	291	2444

Table 17: Number of religious structures in RA, 2020

The most important churches worth to visit are:

1. The Mother Cathedral of Holy Etchmiadzin.
2. Churches of St. Hripsime, St. Gayane and St. Shoghakat.
3. Khor Virap.
4. Geghard monastery complex.
5. Kecharis monastery.
6. Sevanavank Monastery.
7. St. Mesrop Mashtots Church.
8. Tatev Monastery.
9. The Monasteries of Haghpat and Sanahin.
10. Marmashen Monastery.

Description and pictures are to be found in Annex 3 and 4.

► As these are only a few churches from the great list of Armenian churches, we may state that Armenia is to become a religious tourism center for Christian pilgrims like the most visited sites of Jerusalem, Rome and Santiago de Compostela in the world. This would require not only international marketing activities to

⁷³ The information was provided by the Ministry of Education, Science, Culture and Sports of the RA, the data is based on the calculations of the Historical and Cultural Heritage Research Center.



present Armenia as a religious tourism country based on its treasures and history of Christianity but, also, the formulation of conceptual management and development plans at each site to be implemented through cooperation by state and private sectors.

3.2 Existing touristic infrastructures in Armenia.

According to the Statistical Committee of the RA, in 2021 the **number of hotel facilities was 915 in Armenia, 522 of which were in capital Yerevan** and the rest 393 not equally distributed across the other 10 regions

⁷⁴.

Place	Accommodation arrangement ⁷⁵								No. of inbound tourists staying at hotels ⁷⁶	
	2018		2019		2020		2021		2019	2020
	Quantity (unit)	Volume (million AMD)	Quantity (unit)	Volume (million AMD)	Quantity (unit)	Volume (million AMD)	Quantity (unit)	Volume (million AMD)		
Yerevan	390	27879.9	410	33772.2	480	11836.8	522	24187.1	489019	87429
Aragatsotn	5	106.2	7	87.7	7	40.0	8	169.7	13	-
Ararat	9	72.1	8	80.4	8	64.3	10	99.5	11	-
Armavir	4	43.1	15	41.7	16	30.1	18	67.9	-	-
Gegharkunik	11	274.2	39	735.9	40	341.2	42	831.1	5662	22
Lori	19	323.7	30	354.6	30	204.9	31	570.8	1702	10
Kotayk	65	2977.4	91	3220.0	93	2 001.3	101	3861.5	5778	2705
Shirak	28	400.5	33	576.9	33	290.9	34	392.4	11868	1824
Syunik	37	629.4	38	830.5	38	410.7	42	563.8	669	2788
Vayots Dzor	19	700.5	24	588.0	26	261.5	28	911.6	11008	1350
Tavush	65	1090.5	74	1506.2	76	1004.2	79	1754.0	24559	1422
Total, RA	652	34497.5	769	41794.1	847	16485.9	915	33409.4	550289	97550

Table 18: Number of hotel facilities and the volume of activities, 2018-2021 years

In 2020 the number of public catering establishments and the volume of services decreased (by about 8 and 36% compared to 2019), but increased in 2021 (by about 15 and 52% compared to 2020)⁷⁷.

Place	Organization of public catering ⁷⁸							
	2018		2019		2020		2021	
	Quantity (unit)	Volume (million AMD)	Quantity (unit)	Volume (million AMD)	Quantity (unit)	Volume (million AMD)	Quantity (unit)	Volume (million AMD)
Yerevan	1204	99281.9	1662	131108.8	1599	85160.8	1759	127295.5
Aragatsotn	31	436.5	35	760.6	30	479.4	36	562.4
Ararat	148	1189.9	132	1458	124	778.9	137	926.7
Armavir	24	1094.6	68	1032.9	49	568.3	72	1335.3
Gegharkunik	20	1056.8	53	917.2	40	817.2	56	1207.6
Lori	19	840.1	48	695.4	38	458.2	51	808.6
Kotayk	103	7543.8	144	9908.6	134	5682.8	152	9649.2
Shirak	86	2000.4	115	2384.8	92	1245.6	121	2793.3
Syunik	60	722.3	77	978.3	62	510.1	81	809.7
Vayots Dzor	45	764.8	47	824.3	38	932.6	50	1150.5
Tavush	124	1473.1	134	2394.4	115	1 214.0	146	2159.6
Total, RA	1864	116404.2	2515	152463.3	2321	97847.9	2661	148698.4

Table 19: Number of public catering facilities and the volume of services, 2018

Public catering facilities are also unequally distributed in the country: 1759 from 2661 are located in Yerevan, while the rest 902 are distributed in all 10 regions together.

In terms of **travel agencies and operators**, it should be noted that their number in 2020 was 691 compared to 788 of previous year, and the volume of services decreased by 82%. In **2021 their number was 742**, and the volume of services increased by 46% ⁷⁹.

⁷⁴ The information was provided by the Statistical Committee of the RA, in April, 2022.

⁷⁵ The indicators do not include value added tax and other indirect (similar) taxes

⁷⁶ The regions of the Republic of Armenia and the city of Yerevan, in numbers, 2021, pp. 292-293, https://armstat.am/file/article/marzer_2021_22.pdf

⁷⁷ The information was provided by the Statistical Committee of the RA, in April, 2022.

⁷⁸ The indicators do not include value added tax and other indirect (similar) taxes

⁷⁹ The information was provided by the Statistical Committee of the RA, in April, 2022.



Place	Activities of travel agencies, tour operators, reservation and other tourism services ⁸⁰						
	2018	2019	2020	2021			
	Quantity	Volume	Quantity	Volume	Quantity	Volume	Quantity
	(unit)	(million AMD)	(unit)	(million AMD)	(unit)	(million AMD)	(unit)
Yerevan	570	27935.9	662	35543.2	588	6373.0	619
Aragatsotn	5	12.8	7	18.9	5	9.3	6
Ararat	23	310	19	143.2	14	40.1	16
Armavir	10	20.5	14	21.8	12	3.5	14
Gegharkunik	7	86.4	8	64.3	7	6.7	8
Lori	14	69.4	16	76.9	12	2.8	17
Kotayk	23	116.3	26	124.5	23	31.5	26
Shirak	10	71.3	18	101	15	7.4	18
Syunik	3	5.7	6	5.2	5	2.2	7
Vayots Dzor	4	11.8	5	10.8	4	5.4	5
Tavush	8	237.4	7	186	6	22.0	6
Total, RA	677	28877.5	788	36295.8	691	6503.9	742
							9504.3

Table 20: Activity of tourism agencies, tourism operators, reservation of places and other services in the field of tourism, 2018-2021

3.3 Cultural and Heritage Tourism Demand

3.3.1 International demand

In recent years, the number of international tourists to Armenia was growing. The main decrease was in 2020 due to pandemic, but starting from 2021 the sphere was recovering.

Table 19⁸¹ shows the number of incoming tourists to the RA by the purpose of visits. However, it should be noted, that the purpose of visits shows only those who have stayed at hotel facilities. In addition, there is no available statistical data for regions separately.

Year	2017	2018	2019	2020	2021
Incoming tourists of the RA	1,494,779	1,651,782	1,894,377	360,338	870,308
Incoming tourists who stayed at hotel facilities	264,702	307,473	550,289	97,550	278,393
From which by purpose:	100%	100%	100%	100%	100%
<i>Business</i>	23,9 %	27,3 %	15,9 %	15,8%	25,8%
<i>Rest and leisure</i>	52,8 %	48,8 %	55,4 %	50,3%	52,3%
<i>Health treatment</i>	0,2 %	1,4 %	0,5 %	0,4%	0,5%
<i>Other</i>	23,1 %	22,5 %	28,2 %	33,5%	21,4%

Table 21: Inbound tourist visits to RA by purpose, 2017-2021

The table shows that people mainly visit for the purpose of leisure. However, it should be highlighted that:

- purposes are very broad and do not reflect tourist visits according to the niche types of tourism;
- in particular, it is not known how many tourists visited for historical, cultural, religious, rural, eco, educational and other purposes;
- the purpose of treatment does not clearly separate spa-resort and medical tourists. There is also no information about the country of permanent residence, gender, age of the tourists.

Therefore, we do not have specified statistical data about the number of cultural tourists. Nevertheless, as also tourists who are not driven to Armenia for cultural tourism purposes usually visit sites during their stay to complement tourism experience, it is assumed, although not accurately, that total number of cultural tourists equals to the number of incoming tourists. To strengthen this assumption, one can cite that in 2021 only 32% of incoming tourists (278,393 tourists) stayed at hotels, and the division by purpose refers only to them.

► *Accurate and repetitive surveys are suggested to be devised so that to estimate more accurately the volume of cultural and heritage tourists, along with the figures related to other tourism niches.*

3.3.2 Domestic demand

In recent years, the number of domestic tourists was growing in Armenia. In 2019 it was 1,544,600 by

⁸⁰ The indicators do not include value added tax and other indirect (similar) taxes

⁸¹ The socio-economic situation in the RA in 2019 January, p. 105, https://www.armstat.am/file/article/sv_01_19a_421.pdf
The socio-economic situation in the RA in 2020 January, pp. 112-113, https://www.armstat.am/file/article/sv_01_20a_421.pdf
The socio-economic situation in the RA in 2021 January, pp. 113-114, https://www.armstat.am/file/article/sv_01_21a_421.pdf
The socio-economic situation in the RA in 2021 January-December, p. 150, https://armstat.am/file/article/sv_12_21a_421.pdf
The socio-economic situation in the RA in 2022 January, pp. 112-113, https://www.armstat.am/file/article/sv_01_22a_421.pdf



increasing 41.4% compared to the previous year. In 2020, due to the pandemic, the number of domestic tourists also decreased by about 33% compared to 2019, composing 1,045,756 people. **In 2021 the number of domestic tourists grew to 1,595,826 people increasing by 52.6%** compared to 2020 and by 3.3% compared to 2019. The goal of about 77% of them was rest and leisure⁸².

Year	2017	2018	2019	2020	2021
Total domestic tourists⁸³, by purpose:	1,086,707	1,092,322	1,544,600	1,045,756	1,595,826
<i>Business</i>	252,787	207,761	280,542	150,649	247,843
<i>Rest and leisure</i>	742,188	781,668	1,112,305	765,100	1,229,224
<i>Health treatment</i>	43,558	58,339	52,006	53,500	67,325
<i>Other</i>	48,174	44,554	99,747	76,507	51,434

Table 22: Number of domestic tourists of RA, 2017-2021

Here again that statistics is very poor. We have neither the number of domestic tourists by regions, nor their characteristics (age, gender, etc.). As mentioned above, the purpose is very broad again, and it does not reflect tourist visits according to the main types of tourism.

3.3.3 Tourism revenues

According to statistical data **spending at accommodation & public catering services in Jan-Dec 2021 amounted to 182,107.8 million AMD**, increasing by 68.2% compared to the previous year. The volume of activity of tourist agencies also increased. Such services were used by international and domestic tourists⁸⁴.

Type of service	2020 (million AMD)	2021 Jan-Dec (million AMD)	2021 vs 2020 (%)
Organization of accommodation & public catering. Including:	108,245.1	182,107.8	168.2
<i>accommodation arrangement</i>	13,786.0	33,409.4	2.4 times
<i>public catering organization</i>	94,459.1	148,698.4	157.4
Activities of TAs & TOs, reservation & other tourism services	5,241.5	9,504.3	181.3

Table 23: Volume of organization of some tourist services, 2020-2021

3.4 Key Stakeholders

3.4.1 Government

As to October 2022, the Ministry of Education, Science, Culture and Sports of the RA is responsible for developing state policy in the sphere of culture. Before there was the Ministry of Culture developing the policy of the Government of Armenia in the sphere of culture.

The main departments of the ministry are: Department for cultural heritage and folk crafts, Department for modern art, Department for protection of historical and cultural monuments⁸⁵.

Tourism Committee which is in the structure of Ministry of Economy cooperates with Church and the Ministry of Education, Science, Culture and Sports of the RA.

3.4.2 Armenia Apostolic Church

The religious sites belong to Armenian apostolic church, which therefore holds a relevant role in tourism development in Armenia.

3.4.3 Private actors

One good example of private actor's engagement in cultural heritage development is the construction of Wings of Tatev aerial tramway in Syunik region. It was founded in 2010 by *IDEA foundation*⁸⁶.

Wings of Tatev is:

- The shortest, most picturesque and impressive route to Tatev Monastery;
- The longest reversible cableway in the world (5752 m), recorded in the Guinness Book of Records.
- Twelve minutes of unforgettable flight above the ravine of the fierce Vorotan River;
- Celestial highway at the altitude of 320 m;

⁸² The socio-economic situation in the RA in 2018 January, p. 97, https://www.armstat.am/file/article/sv_01_18a_422.pdf, The socio-economic situation in the RA in 2019 January, p. 106, https://www.armstat.am/file/article/sv_01_19a_422.pdf.

The socio-economic situation in the RA in 2020 January, p. 115, https://www.armstat.am/file/article/sv_01_20a_422.pdf.

The socio-economic situation in the RA in 2021 January, p. 115, https://www.armstat.am/file/article/sv_01_21a_422.pdf.

The socio-economic situation in the RA in 2022 January, p. 114, https://www.armstat.am/file/article/sv_01_22a_422.pdf.

⁸³ The data reflect the tourists who stayed at the hotel facilities (hotels, motels, hotel-type resorts, sanatoriums, etc.).

⁸⁴ The socio-economic situation in the RA in 2020 January-December, pp. 56-58, https://armstat.am/file/article/sv_12_20a_126.pdf.

The socio-economic situation in the RA in 2021 January-December, pp. 56-58, https://armstat.am/file/article/sv_12_21a_126.pdf.

⁸⁵ Ministry of Education, Science, Culture and Sports of the RA, URL: <https://escs.am/en/static/structura>

⁸⁶ <https://www.idea.am/>



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- Cutting-edge engineering solutions by Austrian-Swiss Doppelmayr/ Garaventa Group⁸⁷.

The construction of Tatev aerial tramway has led to socio-economic development of the region, as annually more than 200,000 tourists visit the cable car. The income received from its activity goes to the renovation of the Tatev monastery complex and the development programs of the Tatev region.

3.4.4 NGOs

There are different NGOs in the sphere of culture, with their activities mainly aimed at preserving and developing the cultural heritage. Some NGOs organize festivals and other events based on cultural heritage values, so that contribute to promote tourism (e.g. Areni festival foundation organizes the Wine festival every year)⁸⁸.

3.4.5 International initiatives

At the end of 2015, a new project "My Armenia: cultural tourism in Armenia" was launched, which was co-developed by the Government of Armenia, the US Agency for International Development (USAID) and the Smithsonian Institute in the field of preservation of cultural cooperation.

The goal of such 4-year USAID-supported program was to enhance and increase cultural heritage tourism in the provinces of Armenia through a unique combination of research, scholarship, support for artisan craft, capacity building, and a strong focus on fresh thinking for tourism development. The program also aimed at promoting the development of rural communities, raising awareness about Armenia in the international arena, as well as preserving and building on the country's natural and cultural heritage⁸⁹.

The program was worth \$5 million. It aimed at demonstrating the productive relation that can occur when community-based, rigorous cultural heritage research contributes to economic development through sustainable cultural tourism⁹⁰.

As an organized route, «My Armenia» developed Wine Tasting in Vayots Dzor⁹¹, and a digital visitor guide (about Vayots Dzor⁹²) to share information about the cultural heritage of Armenia.

3.5 Relevant current strategies

At the moment there are no tourism development plans in place for cultural and heritage tourism.

In 2017 The "Pilgrimage to the first Christian country" strategy project was developed by the Tourism Committee of the Ministry of Economy of the Republic of Armenia, which was not adopted.

The following measures were planned by the draft strategy (implementation date was specified until 2020):

- formation of a statistical and information system in the field of pilgrimage and religious tourism;
- formation of a coordinating working group for pilgrimage and religious tourism;
- implementation of marketing and promotion activities in target markets;
- development of religious tourist routes;
- development of infrastructure;
- development of human resources;
- international cooperation.

The draft strategy presented examples of pilgrimage program-routes: Pan-Armenian Pilgrimage "St. Gregory the Illuminator's Way", Visit to the First Christian Country, "Pilgrimage to the First Christian Country" route in Lori Marz, " St. Gregory the Illuminator's Way" route and "St. Geghard's covenant day"⁹³.

⁸⁷ Wings Of Tatev Aerial Tramway, <https://tatever.am/en/wings-of-tatev-aerial-roadway>

⁸⁸ Another example is the NGO for the Development and Preservation of Armenian Cookery Traditions also organizes annual festivals: Tolma Festival, The bread in mountains festive event, Barbecue and music festival, Ghapama festival, etc.

⁸⁹ "My Armenia: Cultural Tourism in Armenia" Program Kicks Off, URL: <http://www.gov.am/en/news/item/8192/>

⁹⁰ "My Armenia", URL: <http://www.folklife.si.edu/cultural-sustainability/my-armenia/smithsonian>

⁹¹ About «My Armenia» program, <https://myarmenia.si.edu/hy/about-us/>, <https://myarmenia.si.edu/hy/guide/experiences/>,

<https://myarmenia.si.edu/hy/guide/routes/>

⁹² Vayots Dzor electronic book <https://view.joomag.com/%D5%80%D5%8E%D5%80-%D5%B4%D5%B8%D6%82%D5%AC%D5%BF%D5%AB%D5%B4%D5%A5%D5%A4%D5%AB%D5%A1-%D5%A7%D5%AC-%D5%A3%D6%80%D6%84%D5%A5%D6%80%D5%AB-%D5%B7%D5%A1%D6%80%D6%84-%D4%B3%D5%AB%D6%80%D6%84-%D5%8E%D5%A1%D5%B5%D5%B8%D6%81-%D5%81%D5%B8%D6%80/0709107001498552710?short>

⁹³ "Pilgrimage to the first Christian country" strategy project, <https://www.e-draft.am/projects/229/about>



3.6 SWOT analysis⁹⁴

3.6.1 Strengths

- Armenia was the first country to adopt Christianity as state religion
- Richness of intangible cultural values and areas recognized by the RA government
- Richness of tangible cultural heritage: 24,225 cultural monuments; 2,444 religious objects
- Success stories in cultural heritage development (Tatev Monastery)
- Tangible and intangible cultural heritage assets already in UNESCO WHL

3.6.2 Weaknesses

- Absence of development programs of cultural-heritage-religious tourism
- Absence of guides specialized and officially recognized in cultural-heritage tourism
- Lack of digital and analogic consumer and trade marketing activities to promote cultural-heritage tourism
- Lack of cultural tourism professional knowledge and skills among tourism staff
- Lack of statistical data by regions about the purpose of incoming and domestic tourists' visits
- Lack of virtual cultural tours (AR, VR) by museums and other objects
- Lack of 360° accessibility also to main cultural sites
- Low availability of public resources for cultural development
- Low level of income among resident population
- Low level of infrastructural development
- Low number of direct flights to Armenia and high level of air ticket prices
- Not all cultural-heritage assets and values included in touristic routes
- Dependence on international aid for tourism development
- Poor conservation conditions of several cultural and religious sites
- Poor museum merchandising and lack of diversity of souvenirs in cultural-heritage destinations
- Poor services and infrastructures for people with limitations also at key cultural sites
- Quality inconsistencies at cultural heritage sites
- Weakness of the tourism cultural value chain with low integration with other economic sectors that might add value (quality arts & crafts, local gastronomy, etc.)

3.6.3 Opportunities

- Availability of studies and strategies (although not fully adopted) at national level for cultural/religious tourism ("*Pilgrimage to the first Christian country*" strategy project)
- Big Armenian diaspora as a potential source for incoming tourism to Armenia
- Decreasing costs of digital tools and applications
- Growing number of international tourists interested to long-distance religious and cultural itineraries (e.g. Route of Santiago de Compostela)
- High and growing number of international tourists who are interested in cultural heritage
- Increasing international demand for accessible tourism services
- Increasing international demand for authentic solutions in accommodation and other tourism services
- Increasing popularity of international creative tourism networks
- Shift from passive cultural tourism to experiential and personalized solutions
- Tourist trend to visit new and less crowded cultural sites as post-COVID behavior

3.6.4 Threats

- Increased competition from international cultural destinations
- Possible further restrictions because of COVID-19 pandemic
- Possible reduction in the number of incoming tourists due to the political conflict with neighboring countries

⁹⁴ The analysis is based on surveys, investigations among tourists, sphere organizations and other bodies representing tourism sphere.



3.7 Key gaps to be filled for Cultural and Heritage Tourism development

Based on the Value Chain and SWOT analysis the following strategic gaps can be highlighted in order to ensure development of Armenia Cultural and Heritage Tourism:

- Lack of a well-structured and integrated system of Cultural and Heritage Tourism products;
- Low awareness and market visibility of Armenia's Cultural and Heritage Tourism;
- Low local economic impact from Cultural and Heritage Tourism products;
- Lack of basic institutional tools for Cultural and Heritage Tourism development (legislation, financial incentives, statistics, etc.).

4. RECOMMENDED DEVELOPMENT POLICIES

4.1 Strategy

4.1.1 Strategic objectives

The main goal of the strategy is to build a competitive and sustainable portfolio of cultural and heritage tourism products, which is well visible and accessible by perspective domestic and international tourism demand, while being well rooted in the local context so that to contribute to economic development of guest communities. The pillars of the strategy, which correspond to its strategic objectives are described in the following paragraph.

4.1.2 Specific objectives

Each strategic objective is linked to specific objectives, as showed hereafter:

PILLARS	OBJECTIVES
1. Creation of a competitive and sustainable portfolio of cultural and heritage tourism products	1.1. Protect C&H resources 1.2. Definition of the portfolio of C&H routes and events 1.3. Increase quality levels at cultural sites 1.4. Increase capacity building of C&H tourism operators
2. Assurance of the market visibility and accessibility of such portfolio	2.1. Adopt effective marketing strategies 2.2. Make cultural heritage more accessible
3. Increase of the economic impact from cultural and heritage tourism	3.1. Involve local communities 3.2. Introduce Armenia certified quality merchandising 3.3. Incentivize local micro-entrepreneurs
4. Adaptation of the institutional framework for cultural and heritage tourism development	4.1. Regulate cultural tourism professions and operators 4.2. Regulate economic cooperation between public and private 4.3. Regulate the tourism statistics collection
5. Creation of efficient C&H Tourism Districts	5.1. Improve support facilities and services at key C&H sites 5.2. Improve infrastructures at key C&H sites

Table 24: Pillars and objectives of the Strategy

4.2 Action Plan

In order to reach specific objectives, key actions can be defined. They are reported in the synoptic scheme hereafter. In Annex 4 is provided a detail of each action including:

- strategic objectives;
- specific objectives;
- description;
- key activities;
- key performance indicators;
- source of funding;
- time frame;
- recommendations.



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Strategic objective	Specific objective	Key action
1. Creation of a competitive and sustainable portfolio of C&H tourism products	1.1 Protect the C&H resources	1.1.1 Adopt and implement site management plans
	1.2 Definition of the portfolio of C&H routes and events	1.2.1 Define national criteria for recognition of Armenia C&H routes targeted to different niches (pilgrimage, cyclists, etc.)
		1.2.2 Identify pilgrimage routes
		1.2.3 Identify national cycling routes
		1.2.4 Formulate a national agenda of cultural festivals
	1.3 Increase quality levels at cultural sites	1.3.1 Define minimum quality service standards for cultural sites
	1.4 Increase capacity of CH tourism operators	1.3.2 Implement quality service standards through tourism development plans at key sites
		1.4.1 Develop educational and training programs for the private sector
2. Assurance of the market visibility and accessibility of such portfolio	2.1 Adopt effective marketing strategies	1.4.2 Promote international training exchange programs
		2.1.1 Develop a web cultural marketing strategy
		2.1.2 Develop a trade and press marketing strategy
	2.2 Make cultural heritage more accessible	2.1.3 Develop analogic marketing tools for local information provision
		2.2.1 Increase on-site accessibility through the "Accessible Armenia Tourism Plan"
		2.2.2 Increase on-site accessibility through VR/AR
3. Promote positive impacts on host community and Armenian economy	3.1 Involve local communities	3.1.1 Adopt the concept of cultural ecosystems at local level
		3.1.2 Introduction of the competition for the annual Armenian Capital of Culture
		3.1.3 Support creative tourism at local destination
	3.2 Introduce Armenia certified merchandising	3.2.1 Define standards for Armenia typical arts & crafts
		3.2.2 Develop certified merchandising catalogue
	3.3 Incentivize local micro-entrepreneurs	3.3.1 Introduce micro-grants mechanism for the cultural and creative sector
4. Update of the institutional framework for C&H tourism development	4.1 Regulate cultural tourism professions and operators	4.1.1 Regulate cultural tourism professions
		4.1.2 Regulate cultural tourism NGOs
		4.1.3 Regulate cultural tourism accommodation (scattered hotels, arts B&B, etc.)
	4.2 Regulate economic cooperation between public and private	4.2.1 Regulate sponsorships and patronage to the cultural sector
		4.2.2 Regulate cultural donations
	4.3 Regulate the tourism statistics collection	4.3.1 Implement visitor statistics at cultural sites
		4.3.2 Implement visitors and residents' satisfaction surveys
5. Creation of efficient C&H Tourism Districts	5.1 Improve support facilities and services at key C&H sites	5.1.1 Improve tourism facilities and services at key C&H sites
	5.2 Improve infrastructures at key C&H sites	5.2.1 Improve the local transportation system towards key C&H sites
		5.2.2 Improve road, bulk and digital infrastructures at key C&H sites

Table 25: Strategic and specific objectives and actions for cultural-heritage tourism development in the RA



5. SUSTAINABILITY RECOMMENDATIONS

5.1 Provision of economic benefits

The action plan has been devised so that to maximize economic benefits on the communities that host the C&H sites and on the broader Armenia economy as well. As stated in the report “Assignment 1.2 Local Context Analysis”, tourism has already a great socio-economic significance for Armenia and such impact will be enhanced by interventions foreseen to promote cultural tourism.

Positive economic effects arise when specific actions are taken, such as:

- Specialization of the offer;
- ▶ **Targeting different cultural products-related niches (pilgrimage, cyclists, etc.) by promoting specific offers** (pilgrimage routes, national cycling routes); Pilgrimage routes may be organized to the main religious sites, monasteries, for example Pilgrimage Route to Edjmiatsin, which will include visit to six churches (Mother Holy See of Edjmiatsin, St. Gayane, St. Hripsime, St. Shoghakat, St. Mary the Virgin, St. Archangels churches) (Armavir region), etc.
- ▶ **Introducing minimum service quality standards at cultural sites, along with high-quality merchandising, which will stimulate visitor spending;**
- ▶ **Implementing low-cost marketing activities (web cultural marketing strategy, trade and press marketing strategy) which are usually featured with high financial returns compared to investments;**
- ▶ **Increasing on-site and online accessibility to C&H sites through VR/AR applications that might be associated to special commercial offers;**
 - Involvement of residents in tourism services provision;
- ▶ **Introduction of micro-grants mechanism for the cultural and creative sector, from which might benefit mostly the local communities** Local entrepreneurs, particularly youth and women entrepreneurs may be encouraged to apply for micro-grants if they have projects of establishing cultural accommodations, local arts and crafts, etc, for example for establishing Apricot hotel in Ashnak village.
- Raising of private finance for investments in cultural tourism;
- ▶ **Regulation of sponsorships and donation to the cultural sector, so as to promote private operators' involvement.**

5.2 Preventing socio-cultural problems and encouraging community involvement

The community can also be negatively impacted by tourism due to stress or damage on local resources and cultural values. Local satisfaction with tourism is critical for sustainability. The components of satisfaction cover a range of real and perceived issues – including crowding, access to jobs, sharing in benefits, reaction to tourist behavior, etc.⁹⁵

In order to enhance the socio-cultural benefits of cultural and heritage tourism development at the community numerous steps should be considered, including:

- Increasing community attitudes towards tourism, by involving community in tourism planning and respecting local values;
- ▶ **Involving local communities while adopting the concept of cultural ecosystems at local level.** Local communities should be involved in decision making and other stages of local tourism planning.
- Making social services available to the community and favor access of residents to monument and cultural sites;
- ▶ **Increasing the accessibility to cultural sites through development of the “Accessible Armenia Tourism Plan”, from which will directly benefit people with special needs living in local communities.**
 - Valorizing community traditional crafts, skills, customs;
- ▶ **Valorizing Armenia material and immaterial traditions, through promoting authentic events (“National agenda of cultural festival”) and defining standards for typical arts & crafts to be promoted and develop through a certified merchandising catalogue.**
- Preserve vernacular architecture;

⁹⁵ World Tourism Organization (2004). *Indicators of Sustainable Development for Tourism Destinations*. Madrid: WTO



- ▶ **Regulate a new form of cultural tourism accommodation based on re-use and valorization of traditional houses as scattered hotels and boutique hotels.**

- Verifying Local satisfaction level with tourism (and with specific components of tourism) based on questionnaire;

- ▶ **Implementation of residents' surveys to monitor local satisfaction with tourism activities.**

5.3 Preventing negative environmental impacts

The plan is not associated with any negative environmental impact. On the opposite, it contributes positively to the preservation and protection of cultural-heritage sites and monuments:

- ▶ **Adopting and implementing site management plans;**
- ▶ **Involving scattered C&H sites in routes targeted to different niches (pilgrimage, cyclists, etc.), thus indirectly contributing to their valorization;**
- ▶ **Implementing quality service standards at each key site.**

A number of sites and monuments of cultural importance are located on the territory of specially protected nature areas (SPNA) and forestries, which jointly cover more than 23% of the country's territory. For instance, more than 150 cultural monuments, including 15 ancient villages, 9 churches, and 4 fortresses are located in the Khosrov Forest State Reserve, whereas 1458 and 473 monuments are registered from the Sevan and Dilijan National Parks respectively.

The site-managing local body (SPNA or forestry) is responsible for the conservation of historical-cultural monuments, however, activities related to development and restoration projects should be allowed by the Ministry of Education, Science, Culture, and Sports of the Republic of Armenia and agreed with Ministry of Environment (EIA) of the RA.

- ▶ **Meantime, according to the law on Environmental Impact Assessment of the RA, all activities within the territory of specially protected nature areas are subject to EIA.**

One of the major environmental issues of the cultural-heritage sites in Armenia is the lack of waste management culture, absence of proper collection and sanitation services, recycling facilities, presence of nearby illegal dumpsites, etc. An increase in tourism flow generates more solid waste.

- ▶ **Subsequently, competitive C&H tourism products and services should incorporate better waste management practices in place.**

5.4 Manpower planning

The plan assumes the qualification of C&H tourism operators a pre-requisite for achieving above described social and economic benefits. It therefore dedicates broad attention to such issue:

- ▶ **Increasing the capacity of C&H tourism operators, through developing educational and training programs;**
- ▶ **Promoting international training exchange programs, particularly aimed to expose youths to best experiences in cultural management.**

5.5 Adoption of consistent legislation

The valorization of the C&H tourism niche might be favored by the adoption of proper legislation, which is considered in the present report:

- Setting and regulation of Armenia cultural routes;
- ▶ **Identify Armenia cultural routes so as to enhance their visibility and adopt services targeted to the needs of tourists such as pilgrimages or cyclists.**
- Setting of minimum quality standard levels;
- ▶ **Define minimum quality service standards for cultural sites.**
- Setting and regulation of cultural tourism professions and operators;
- ▶ **Regulate cultural tourism professions and operators. Particularly, it specifies the recognition of certified tourism guides is a key intervention;**
- ▶ **Regulate cultural tourism NGOs as well as specialized tourism services, such as in the field of accommodation.**



- Setting and regulation of private partnerships and fiscal incentives;
- ▶ **Regulate sponsorships and patronage to the cultural sector, as well as cultural donations by private citizens⁹⁶.**
- Setting and regulation of cultural statistics;
- ▶ **Adopt a national system of tourism cultural statistics, coupled with visitors' and residents' surveys, to be implemented with cooperation of Armenian universities.**
- Adoption and/or amendment of the relevant legislation referred to climate adaptation issues, including green transition of the economy (see also § 6).
- ▶ **As tourism sector is recognized as priority sector by the Government of Armenia it needs to be in line with the national action plans on climate adaptation and mitigation.**
- ▶ **The sectoral legislation shall also be corresponded with such national policies and the existing legislation, which derives from it.**

5.6 Investment policies and incentives

Building on the experience of other international cultural destinations, the development of the C&H tourism niche might benefit from the provision of dedicated micro-grants aimed to stimulate youth, women and residents' participation:

- ▶ **Building on the rich but also underrated wealth of cultural Armenia traditions, it is necessary to support creative tourism at local destination;**
- ▶ **Introduction of micro-grants mechanism for the creative and cultural sector. The establishment of such micro-grants might be endorsed by the approval of a dedicated national law.**

5.7 Organization and management of the tourism niche

The implementation of the action plans relies on the collaboration of key stakeholders, which include, besides the Tourism Committee, the Ministry of Education, Science, Culture and Sport, which has the property of most C&H sites, and the Armenian Church, which manages much of the assets, with specific regard to churches and monasteries.

- ▶ For this reason, it is envisaged that a **task force is constituted at the national level**, by involving such actors, so as to obtain their prompt engagement. Such task force might involve further national and international-level actors based on specific needs.

Similarly, cooperation should be ensured at the local level, particularly to involve local communities.

- ▶ Although current institutional assets foresee the involvement of Marzes, possibly with Local Self-Government Bodies, **such pivotal role might be conveniently covered by future DMOs**, whose implementation is foreseen at the task 3 of Assignment 1 of the present consultancy.

6. CLIMATE CHANGE VULNERABILITY ASSESSMENTS AND RECOMMENDATIONS-PROJECTS FOR THE DESTINATION

Armenia is one of the vulnerable countries facing various impacts of climate change. According to the Fourth National Communication on Climate Change, it is projected to raise the temperature in the country up to 4.7°C by 2100 and reduction of annual precipitation (8.3%). Tourism is significantly affected by heavy precipitation, floods, droughts and heat waves. In Armenia these phenomena increased during the recent decades.

On May 13, 2021, the Government of Armenia adopted Resolution 749-L "On Approving National Climate Change Adaptation Action Plan (NAP) and List of Measures for 2021-2025". The list of measures incorporates the development of RA draft Government Decree "On Approving Climate Change Adaptation Program in Sector of Tourism". The document has been developed and discussed with general public. It incorporates adaptation measures for the tourism sector, including winter tourism. The document guides the implementation

⁹⁶ For instance, if we refer to the Italian legislation about PPP applied to C&H, we find different fiscal tools, including financial and technical sponsorships, liberal donations by enterprises and individuals, and a new tool (Art Bonus) which allows for fiscal reductions up to 65% to enterprises and individuals who donate not only for restoring purposes, but also for sustaining special initiatives such as cultural exhibitions or events. A constantly updated [website](#) allows to know which initiatives are candidate and compete to be financed and how much money is still need to reach the objective [Formato r. and Presenza A. (2018). Op. Cit.]



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of climate change adaptation measures in the tourism sector, enabling the identification, addressing and review of adaptation needs, issues, priorities and necessary resources.

According to the draft Governmental Decree “On Approving Climate Change Adaptation Program in Sector of Tourism”, touristic destinations such as Jermuk and Ashotsk are the most vulnerable locations in relation to heat waves, whereas Syunik and Shirak provinces for cold waves. Increasing temperature and low level of precipitation results in droughts, which affect different tourism products. Floods are also periodically registered in the major touristic destinations including Garni, Geghard, Jermuk. The snowstorms are another important phenomenon influencing tourism.

The list of adaptation measures for the period of 2023-2027 are proposed by the draft Government Decree “On Approving Climate Change Adaptation Program in Sector of Tourism”. The measures include various activities such as capacity building or needs assessments for different stakeholders, infrastructure development for key touristic destinations, etc.

The European Commission (EC) declares “climate change is directly and indirectly threatening all forms of cultural heritage”. In addition, the continuous increase in temperature and fluctuations in humidity or in freeze–thaw cycles causes degradation and stress in materials, leading to a greater need for restoration and conservation⁹⁷.

To emphasize the importance of CH and the risk of its deterioration through climate change, the EC has adopted ten recommendation, which can be adapted to the Armenian context:

- Ensure structured cooperation at all levels of governance
- Create and constantly update a climate change cultural heritage risk assessment
- Initiate a full review of the economic costs of climate change adaptation/ mitigation solely for cultural and natural heritage
- Participate to international platforms for exchange, discussion, expertise and knowledge sharing about the impacts of climate change on cultural heritage and its contributions in the fight against climate change
- National-/regional-level and local-level administrations must include cultural heritage and the cultural domain in all actions and plans addressing mitigation of and adaptation to climate change.
- National and regional authorities must build capacity and multidisciplinary expertise to ensure the safeguarding of cultural heritage against climate change through education, training and upskilling at all levels
- National authorities must recognize the importance of research as the indispensable driver to advance the cultural heritage sector
- Encourage heritage protection through the activation of ad-hoc monetary and fiscal policies
- Government should ensure cooperation at all levels of governance and in relevant policy domains, especially in planning bodies, between those responsible for climate change actions and those responsible for cultural heritage.

⁹⁷ Strengthening cultural heritage resilience for cultural heritage – where the European Green Deal meets Cultural Heritage, European Commission (2022).



7. Table 26. TIME SCHEDULE OF KEY ACTIONS

Strategic objective	Specific objective	Key action	Years									
			1	2	3	4	5	6	7	8	9	10
1. Creation of a competitive and sustainable portfolio of C&H tourism products	1.1 Protect the C&H resources	1.1.1 Adopt and implement site management plans		•								
		1.2 Definition of the portfolio of C&H routes and events		•								
	1.2.1 Identify pilgrimage routes	1.2.1 Define national criteria for recognition of Armenia C&H routes targeted to different niches		•								
		1.2.2 Identify pilgrimage routes			•							
		1.2.3 Identify national cycling routes					•					
		1.2.4 Formulate a national agenda of cultural festivals	•									
	1.3 Increase quality levels at cultural sites	1.3.1 Define minimum quality service standards for cultural sites		•								
		1.3.2 Implement quality service standards through tourism development plans at key sites			•							
	1.4 Increase capacity of CH tourism operators	1.4.1 Develop educational and training programs for the private sector		•								
		1.4.2 Promote international training exchange programs			•							
2. Assurance of the market visibility and accessibility of such portfolio	2.1 Adopt effective marketing strategies	2.1.1 Develop a web cultural marketing strategy		•								
		2.1.2 Develop a trade and press marketing strategy		•								
		2.1.3 Develop analogic marketing tools for local information provision		•								
	2.2 Make cultural heritage more accessible	2.2.1 Increase on-site accessibility through the "Accessible Armenia Tourism Plan"					•					
		2.2.2 Increase on-site accessibility through VR/AR			•	•	•	•				
					•	•	•	•				
3. Promote positive impacts on host community and Armenian economy	3.1 Involve local communities	3.1.1 Adopt the concept of cultural ecosystems at local level										
		3.1.2 Introduce the National Competition for the Creative Capital of Armenia		•								
		3.1.2 Support creative tourism at local destination			•							
	3.2 Introduce Armenia certified merchandising	3.2.1 Define standards for Armenia typical arts & crafts	•									
		3.2.2 Develop certified merchandising catalogue		•								
	3.3 Incentivate local micro-entrepreneurs	3.3.1 Introduce micro-grants mechanism for the cultural and creative sector		•								
				•								
4. Update of the institutional framework for cultural and heritage tourism development	4.1 Regulate cultural tourism professions and operators	4.1.2 Regulate cultural tourism NGOs		•								
		4.1.3 Regulate cultural tourism accommodation (scattered hotels, arts B&B, etc.)		•								
		4.2.1 Regulate sponsorships and patronage to the cultural sector		•								
	4.2 Regulate economic cooperation between public and private	4.2.2 Regulate cultural donations		•								
		4.3.1 Implement visitor statistics at cultural sites			•							
	4.3 Regulate the tourism statistics collection	4.3.2 Implement visitors and residents' satisfaction surveys				•						
						•						
5. Creation of efficient C&H Tourism Districts	5.1 Improve support facilities and services at key C&H sites	5.1.1 Improve tourism facilities and services at key C&H sites			•							
	5.2 Improve infrastructures at key C&H sites	5.2.1 Improve the local transportation system towards key C&H sites			•							
		5.2.2 Improve road, bulk and digital infrastructures at key C&H sites			•							

Legend: • = formal approval of the action; ■ = implementation of the action



ANNEX 1 – List of intangible cultural values of RA

1. Sasna Tsrer epic, (folklore)
2. Kochari, (Folk dance)
3. Yarkhushta, (Folk dance)
4. Traditional wedding ceremony,
5. Khavitc. It is a type of flour dish that is considered necessary to restore the strength of women who have just given birth.
6. Choana raising. When bathing newborn babies, it is a habit to massage the part of the throat, choana (Latin choana) and the palate, as a result of which, by strengthening the muscles in the throat and palate, the freedom of the airways, loudness of the voice, etc. is achieved.
7. Symbolic application and decoration of Tari bread,
8. Feast of Saint Sargis, (Folk holiday)
9. Terendez, (Folk holiday in the families of the newlyweds and the newly engaged).
10. Vardavar, (Folk holiday)
11. Worship of St. Tevatoros of Nigavan village, Aragatsotn marz, RA, (folk belief and custom)
12. Worship of Tuxh Manuk of Kasakh village, Aragatsotn marz, RA, (folk belief and custom)
13. The song "Crane", (folk music)
14. "Come and see" song, (folk music)
15. Batola, (folk dance, ritual wedding dance)
16. Traditional blacksmithing, (skills and knowledge related to traditional crafts)
17. Mastery of cross-stone making, (Skills and knowledge related to traditional crafts)
18. Family tree, a symbol of memory, phenomena, events, processes related to the history of the nation, the origin of the clan
19. Lace making, (traditional craft, decorative-applied art, artistic fabric)
20. A tradition of making and using a wooden charm, (folk belief and applied art)
21. Minstrel romance, (musical-narrative, musical-poetic art)
22. Tradition of "tonir" preparation and application, (knowledge and skills related to traditional crafts)
23. Lavash. traditional bread making, meaning and cultural manifestations, (folk subsistence culture)
24. Gatha preparation and cultural manifestations, (folk subsistence culture)
25. Armenian letter art and its cultural manifestations, (folk applied art)
26. Preparation of fruit vodkas, (folk subsistence culture, fruits processing)
27. The tradition of preparing and using yogurt, (folk subsistence culture)
28. Traditional carpet weaving, (skills and knowledge related to traditional craft, decorative and applied arts)
29. Tamzara, (folk dance)
30. "Tar and tar crafting", (traditional musical culture, performance art, instrument making)
31. Winery, (folk livelihood culture, grape processing),
32. Sahari, (traditional musical culture, instrumental performing arts, ritual music)
33. Pilgrimage to Saint Thaddeus the Apostle Monastery, (folk belief, holiday, Christian pilgrimage)
34. "Feast of the Ascension" (Status), (folk and church holiday)
35. "Easter, Holy Resurrection Day, Holy Easter", (folk and church holiday)
36. "New Year" holiday, (folk holiday)
37. Yezidi wedding ceremony, (custom associated with human life cycles and ritual)
38. Funeral ritual, (folk custom)
39. Assyrian New Year celebration, (folk holiday)
40. Duduk and its music, (traditional musical culture, performance art),
41. "Kanon" musical instrument, (traditional musical culture, performance art, musical performance)
42. The celebration of Mount Musa, (folk holiday)
43. The tradition of Kurkut ritual dish in Kapan, (folk subsistence culture)
44. The tradition of making dried apricots and figs in Meghri, (folk livelihood culture, fruit processing)
45. The embroidery culture of the Syrian-Armenian community of Armenia, (skills and knowledge related to traditional craft, decorative and applied arts).⁹⁸

⁹⁸ "Standards for compiling the lists of intangible cultural values of the Republic of Armenia and the list of intangible cultural heritage values", Government of the Republic of Armenia, Appendix 2 of the decision N 310-A of March 11, 2010. <https://www.arlis.am/DocumentView.aspx?docid=105428>
N 599-A decision of the Government of the Republic of Armenia of April 15, 2021 on making an addition to the decision N 310-A of March 11, 2010 of the RA Government, <https://www.arlis.am/DocumentView.aspx?docid=151785>



ANNEX 2 – List of Intangible Cultural Values in need of immediate protection of RA

Since 2011:

- "Karos khach" novel song, (folklore, religious novel song),
- Tightrope walking (pahlevan games), (folk dance, ritual dance),
- "Songs of Status", (folk music, folklore, folk holidays),
- "Avetis", (folklore, music-poetry genre),
- "Khachbur" (concepts about the development of nature and economy, folk holidays),
- Embroidery, (skills and knowledge related to traditional crafts, decorative-applied art genre),
- Barekendan, (folk holiday)⁹⁹.

Since 2019:

- Vordan the red. (Traditional knowledge, skills and experience related to the Armenian vordan, Skills and knowledge related to traditional craft, decorative and applied arts)
- Gyumri kikan (mushurba), (Skills and knowledge related to traditional craft, decorative and applied arts)
- Puppet Theater of Shadows, (Folk theatre),
- Parkapzuk, (Folk instrumental art),
- "Kokh" wrestling, (folk sport, action game)¹⁰⁰.

In 2021 the following values were added:

- A tradition of using a wine jar, (People's subsistence culture. making wine using a crucible)
- Wool sewing, (Traditional craft),
- Traditional horse games, (Folk games)
- Pontian dialect of the Greek population of Armenia, (Ethnic language, dialect)
- "Shulal" carpet, (Skills and knowledge related to traditional craft, decorative-applied art),
- Ud, (String instrument, Folk instrumental art),
- Kamani and Kemano, (Folk instrument art),
- Hazarashen, (Folk architecture)¹⁰¹.

⁹⁹ "Standards for compiling the lists of intangible cultural heritage in need of immediate protection of the Republic of Armenia and the list of intangible cultural heritage values compiled on their basis", Appendix 2 of the decision N 36-H of January 20, 2011 of the Government of the Republic of Armenia., <https://www.arlis.am/DocumentView.aspx?docid=65356>

¹⁰⁰ Annex to Decision N 130-N of February 21, 2019 of the Government of the RA on making additions to the decision No. 36-N of January 20, 2011 of the Government of the Republic of Armenia <https://www.arlis.am/DocumentView.aspx?docid=128612>

¹⁰¹ Annex to Decision N 1825-N of November 4, 2021 of the Government of the RA on making additions to the decision No. 36-N of January 20, 2011 of the Government of the Republic of Armenia, <https://www.arlis.am/DocumentView.aspx?docid=157496>



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ANNEX 3 – Main Churches in RA

1. **The Mother Cathedral of Holy Etchmiadzin**, which was built and consecrated by St. Gregory the Illuminator and St. Trdat the Great in 303 AD, the Cathedral is located in the city of Vagharshapat. St. Gregory chose the location of the Cathedral in accordance with a vision that he had. In his dream he saw "Miatsin", the Only Begotten Son of God, with glittering light on his face descending from the Heavens and with a golden hammer striking the ground where the Cathedral was to be located. Hence comes the name "Etchmiadzin", which translates literally to "the place" where the Only-Begotten Son of God descended¹⁰².
2. **Churches of St. Hripsime, St. Gayane and St. Shoghakat**. Hripsime was one of a group of nuns who lived in Rome under the direction of their superior, Gayane, around 284-305 AD. When Roman Emperor Diocletian tried to force the beautiful Hripsime to marry him, the nuns fled to Armenia. There, the Armenian king, Trdat, fell in love with Hripsime's beauty and decided she should be his wife. But the nun refused to break her vows to God by marrying the king. King Trdat tortured Gayane, trying to get her to permit Hripsime to marry him, but Gayane refused to give in. Eventually King Trdat had Gayane, Hripsime, and the other nuns tortured and killed because they chose their faith and devotion to God over the wishes of a king¹⁰³. Now at the places of their graves are churches. Then the Church of Shoghakat (meaning "drop of light" because of the ray of light that came down from heaven upon Hripsime's martyrs) was build.
3. **Khor Virap** is one of the most popular destinations in Armenia. When King Trdat III ruled over Armenia, his assistant was St. Gregory the Illuminator who preached the Christian religion. However, Trdat was a pagan and he subjected Gregory to severe torture and prisoned him for 13 years in Khor Virap (is translated "deep pit"). According to a legend the king caught a strange illness, his ears became the ears of a pig. His sister saw a dream as if only Gregory could heal him and he indeed healed the king with his prayings to God. After that Trdat turned to be the most loyal supporter of Christianity. Armenia became the first country in the world to adopt Christianity as its official religion (301 AD). At the place where the prison pit had been located the Khor Virap monastery was built.
4. **Geghard monastery complex** was founded in the 4th century by Gregory the Illuminator at the site of a sacred spring inside a cave. The monastery had thus been originally named Ayrvank, meaning "the Monastery of the Cave". The name commonly used for the monastery today, Geghard, or more fully Geghardavank, meaning "the Monastery of the Spear", originates from the spear which had wounded Jesus at the Crucifixion, allegedly brought to Armenia by Apostle Jude, called here Thaddeus, and stored amongst many other relics. Now it is displayed in the Echmiadzin treasury¹⁰⁴.
5. **Kecharis monastery** is a medieval Armenian monastic complex dating back to the 11th to 13th centuries, located in the ski resort town of Tsakhkadzor. The monastery consists of four churches (Saint Gregory the Illuminator Church, Saint Nshan (Sign of Cross) Church, Saint Katoghike Church, Saint Harutyun Church (Holy Resurrection), a hall, two chapels and various cross-stones¹⁰⁵.
6. **Sevanavank Monastery** (founded in 874) is a monastic complex located on a peninsula at the northwestern shore of Lake Sevan. The monastery is comprised of two churches, Surb Arakelots (Holy Apostles) and Surb Astvatsamayr (Holy Mother of God)¹⁰⁶.
7. **St. Mesrop Mashtots Church** was built in 443 in Oshakan village on the grave of St. Mesrop - the inventor of the Armenian alphabet. Then during 1639-1645 and again 1873-1879 it was rebuilt.
8. **Tatev Monastery** is a 9th-century Armenian Apostolic monastery and is one of the most wonderful places of Armenia. According to tradition, Tatev Monastery is named after Eustateus, a disciple of St. Thaddeus the Apostle, who preached and was martyred in this region. His name has evolved to Tatev. The monastery consists of 3 churches - St. Gregory the Illuminator, St. Paul and Peter, St. Mary. In the 14th and 15th centuries the monastery hosted one of the most important Armenian medieval universities, the University of Tatev, which contributed to the advancement of science, religion and philosophy, reproduction of books and development of miniature painting. Now the longest reversible aerial tramway in the world (5.7 km cableway) is located there (was included in the Guinness World Records as world's longest non-stop double track cable car)¹⁰⁷.

¹⁰²The Armenian Church, Mother See of Holy Etchmiadzin, URL: <http://www.armenianchurch.org/index.jsp?sid=1&id=2360&pid=4>

¹⁰³The History of the Armenian Church, URL: <http://www.armenianchurch-ed.net/our-church/history-of-the-church/history/>

¹⁰⁴Geghard, URL: <https://en.wikipedia.org/wiki/Geghard>

¹⁰⁵Kecharis Monastery, URL: https://en.wikipedia.org/wiki/Kecharis_Monastery#Chapels

¹⁰⁶Sevanavank, URL: <https://en.wikipedia.org/wiki/Sevanavank>

¹⁰⁷Tatev monastery, URL: https://en.wikipedia.org/wiki/Tatev_monastery



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9. **The Monasteries of Haghpats and Sanahin** represent a fusion of vernacular and Byzantine ecclesiastical architecture. Both monasteries are located in the Debed Canyon, in the Lori-region of North Armenia. Their oldest structures date back to the 10th century¹⁰⁸.
10. **Marmashen Monastery** is a 10th-century Armenian monastic complex consisting of five churches near the village of Marmashen in the Shirak Province of Armenia. Marmashen monastery consists of three religious structures. The main temple is located in the center of the courtyard and is the largest building built by prince Vagram Pakhlavuni in 988-1029. The temple is built from red tufa and is a dome hall. The facade is cross-shaped, decorated with arched niches and narrow windows. The umbrella dome is installed on a faceted drum. The big church is decorated with plastic décor, with arches and beam columns and is distinguished by the vertical orientation of the architectural volumes. To the south of the main buildings of the monastery is a small cross-domed church of the 11th century with 4 annexes. In the west are the ruins of the 13th-century four-columned gavit, the four-chapsid round temple and the tomb. During the Seljuk invasion, Marmashen suffered significantly. In 1225, restoration works were carried out in the church by the grandsons of Vagram Pakhlavuni, Archbishop Grigor and Garib¹⁰⁹.
11. **The Saint Gregory the Illuminator Cathedral in Yerevan** is currently the largest cathedral of the Armenian Apostolic Church in the world. It is located in the center of Yerevan, the capital of Armenia. The consecration of the cathedral took place on September 23rd, 2001, on occasion of the 1700th anniversary of the proclamation of Christianity as a state religion of Armenia. The cathedral houses the relics of Saint Gregory the Illuminator and the Holy Remains of St. Gregory that were brought from Naples, Italy. Shortly after the consecration of the cathedral, Pope John Paul II paid a visit to the cathedral¹¹⁰.

¹⁰⁸ Haghpats and Sanahin, URL: <http://www.worldheritagesite.org/sites/haghpatsanahin.html>

¹⁰⁹ Marmashen Monastery, https://en.wikipedia.org/wiki/Marmashen_Monastery

¹¹⁰ Apostolic voyage in Armenia, URL: http://w2.vatican.va/content/john-paul-ii/en/homilies/2001/documents/hf_jp-ii_hom_20010926_yerevan-st-gregory.html



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ANNEX 4 – Pictures of main Churches in RA¹¹¹



Figure 5: The Mother Cathedral of Holy Etchmiadzin (World Heritage List of UNESCO)



Figure 6: St. Hripsime church (World Heritage List of UNESCO)

¹¹¹ The Pictures were taken from different sources on Internet.



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Figure 7: St. Gayane church (World Heritage List of UNESCO)



Figure 8: St. Shoghakat church (World Heritage List of UNESCO)



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Figure 9: Khor Virap Monastery

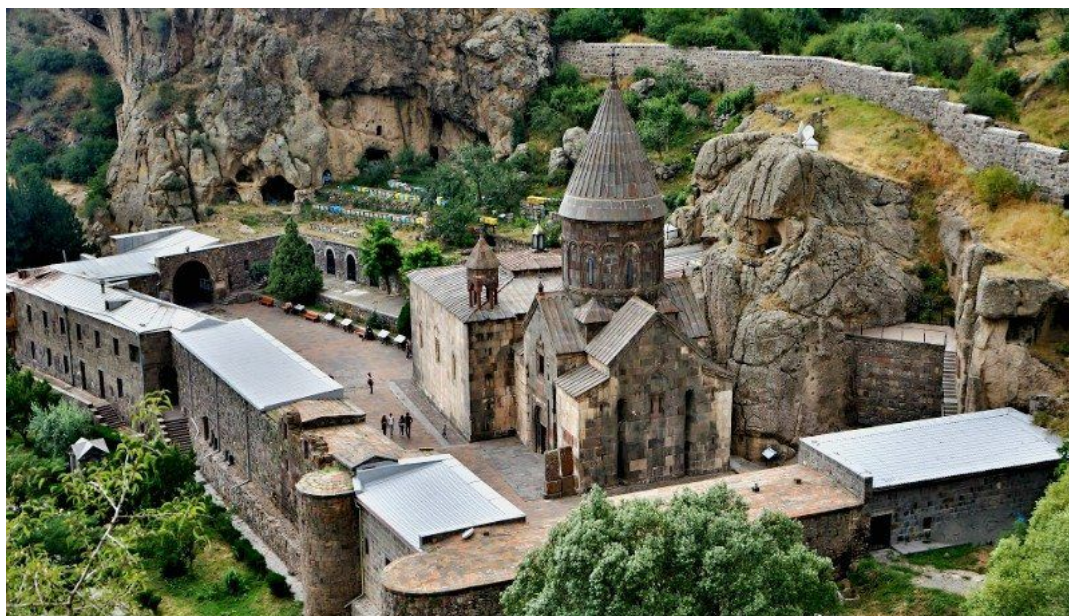


Figure 10: Geghard monastery complex (World Heritage List of UNESCO)



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Figure 11: Kecharis monastery



Figure 12: Sevanavank Monastery



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Figure 13: St. Mesrop Mashtots Church



Figure 14: Tatev Monastery



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Figure 15: Haghpata Monastery (World Heritage List of UNESCO)



Figure 16: Sanahin monastery (World Heritage List of UNESCO)



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Figure 17: Marmashen Monastery



Figure 18: The Saint Gregory the Illuminator Cathedral in Yerevan



ANNEX 5 – Detail of actions

1. Creation of a competitive and sustainable portfolio of C&H tourism products

1.1. Protect the C&H resources

1.1.1. Adopt and implement site management plans

Action	1.1.1 Adopt and implement site management plans
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.1 Protect the C&H resources
Description	Formulation of management plans for key C&H sites
Key activities	<ul style="list-style-type: none"> Define the list of key cultural heritage sites, which deserve site management plan (SMP) Prioritize according to relevance and other considerations (e.g. geographical balance) Process SMP for identified sites and according to priority list by: <ul style="list-style-type: none"> Engaging local communities for sustainable development Assessing current situation of protection, infrastructures and service at each site Formulating management plans according to international standards Adopting proper governance mechanism by involving key stakeholders Formulating business plan for site management and valorization Identifying key performance indicators Implementing SMPs
Key Performance Indicators	Each year development and formal approval of SMP for 4 sites
Subject responsible	<ul style="list-style-type: none"> Ministry of Education, Science, Culture and Sport Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Other relevant State organs Local government bodies Armenian church DMOs Local Communities Private operators Tourists
Source of funding	Public budget
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> Identify key implementing responsibilities Cooperate with relevant stakeholders to understand their needs and inputs Start with the sites included in UNESCO list Adopt effective governance and management mechanisms Adjust the SMPs with the development plans of the communities where the SMP shall be developed Coordinate and systemize the legal and institutional procedures of setting the local fees in tourism sites (i.e. situation with Garni community) Coordinate the activities with all stakeholders (administration of state reserves and national parks, state bodies who manage the natural and cultural monuments, church, etc.)



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1.2. Definition of the portfolio of C&H routes and events

1.2.1. Define national criteria for recognition of Armenia C&H routes

Action	1.2.1 Define national criteria for recognition of Armenia C&H routes targeted to different niches (pilgrimage, cyclists, etc.)
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.2 Definition of the portfolio of C&H routes and events
Description	Formulation of national criteria to identify Armenia C&H routes
Key activities	<ul style="list-style-type: none"> • Explore the best international experience of cultural routes, their formulation and development • Engage stakeholders, researchers, lawyers in this work • Define national criteria for pilgrimage routes • Define national criteria for cyclists' routes
Key Performance Indicators	National criteria for C&H routes approved by the Government of Armenia in 3 years
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • Other relevant State organs • Armenian Church • Local government bodies • Tourists • Private sector • Population of the RA
Source of funding	Public sector
Time frame	Year 2
Recommendations	Explore international best practice about this action



1.2.2. Identify pilgrimage routes

Action	1.2.2 Identify pilgrimage routes
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.2 Definition of the portfolio of C&H routes and events
Description	Creation of key pilgrimage routes
Key activities	<ul style="list-style-type: none"> • Explore the existing pilgrimage routes in the world • Together with Armenian church define main routes (the routes may be different, based on the main figures of Armenian church) e.g.: <ul style="list-style-type: none"> - Route to Mother Holy See of Edjmiatsin, St. Gayane, St. Hripsime and St. Shoghakat churches (Armavir region) - Route to Khor Virap and Noravanq monasteries (Ararat and Vayots Dzor) - Route to Geghard monastery (Kotayk region) - Route to Hovhannavanq and St. Hovhannes (where the relics of John the Baptist are) - Route to the Churches in Aragatsothn region (Tsaxkevanq on Ara Mountain, St. Sargis, St. Marine, Karmravor, Spitakavor, Ciranavor, St. Gevorg, and other churches) - Route to Haritchavank, Marmashen monasteries and churches in Gyumri (Shirak region) - Route to Tatev monastery (Syunik region) - Route to Sevanavank, Hayravank, monasteries, Kecharis, Haghartsin and Goshavanq (Gegharkunik, Kotayk and Tavush regions) - Route to Haghpata, Sanahin, Akhtala and Odzun monasteries (Lori region) - Route to churches in Yerevan • Define national standards according to tourism services and infrastructure • Identify the main infrastructures and services gaps for each route • Defining the necessary financial budget for making routes usable by tourists • Creating pilgrimage certifications for pilgrimage tourists as in Rome, Santiago de Compostela, Jerusalem • Marketing routes and attract tourists by awarding and promoting the "Pilgrimage to the first Christian country: Armenia" certificate to pilgrimage tourists as in Rome, Jerusalem and Santiago de Compostela
Key Performance Indicators	<ul style="list-style-type: none"> • No. of yearly processed routes (each year at least 3 route) • Pilgrimage flows (each year more than 10% growth)
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Armenian Apostolic Church • Tour companies • Other private operator • Other relevant State bodies • Regions • Local government bodies
Source of funding	Public and Private sector
Time frame	Year 3
Recommendations	<p>Advertising the identity of Armenia as the first Christian country.</p> <p>The international best practice shows that Christian pilgrims like to visit holy sites and Armenian potential as the first Christian country can be great if properly used.</p>



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1.2.3. Identify national cycling routes

Action	1.2.3 Identify national cycling routes
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.2 Definition of the portfolio of C&H routes and events
Description	Creation of a national network of cycling routes
Key activities	<ul style="list-style-type: none"> • Explore international cycling routes and identify key services to attract international tourists • Identify key areas for creating cycling routes in Armenia • Identify basic infrastructures needs for creating these routes • Create routes by include historical and cultural monuments as well as other attractions in the cycling routes • Organize service to host cycling routes at C&H sites
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of the national plan of cycling network • At least 1 cycling route created each year
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • State organs • Other State relevant State organs • Local government bodies • Private sector • Armenian church
Source of funding	Public and private sector
Time frame	Year 5
Recommendations	<p>Adopt international standards to define the routes.</p> <p>Use secondary roads so as to guarantee safety to tourists</p> <p>Include the cultural areas defined by Government.</p> <p>Organize a yearly event to promote the routes.</p>



1.2.4. Formulate a national agenda of cultural festivals

Action	1.2.4 Formulate a national agenda of cultural festivals
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.2 Definition of the portfolio of C&H routes and events
Description	Formulation of a national agenda of most relevant cultural events to be marketed on international markets, followed by their organization
Key activities	<ul style="list-style-type: none"> Identify the agenda by considering, for instance, the following festivals: <ul style="list-style-type: none"> Festivals of kochari and yarkhushta Festival of baking gatha and lavash Grand celebration of the church holidays of Saint Sargis, Terendez, Vardavar, etc. Set a national promotion committed by involving key stakeholders Formulate a sound business plan for each Festival, so as to structure costs and revenues and foresee the potential contribution of donors and sponsors Market the festival through the unique national agenda
Key Performance Indicators	<ul style="list-style-type: none"> Set up of the national festival committee Approval of the national agenda by the Tourism Committee Implementation of new festivals based on cultural values (each year at least 1 new festival) Level of cultural value appreciation by Armenians and tourists, to be assessed by surveys Number of incoming and domestic tourists participating at the festivals (each year more than 10 % growth of tourists)
Subject responsible	<ul style="list-style-type: none"> Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Armenian Apostolic Church Tour companies Festival organizing companies Other private sector operators Other State bodies Local communities
Source of funding	Private sector, Tourism Committee
Time frame	Year 1
Recommendations	<p>Festivals should be based on the cultural values and areas defined by the Government.</p> <p>During different types of festivals, organize performances of national dances - kochari and yarkhushta, demonstrations of cross-stone mastery, embroidery, demonstrations of how to bake lavash in tonir, how to make gatha, performance of tightrope dancing, etc.</p>



1.3. Increase quality levels at cultural sites

1.3.1. Define minimum quality service standards for cultural sites

Action	1.3.1 Define minimum quality service standards for cultural sites
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.3 Increase quality levels at cultural sites
Description	Identification of minimum quality service standards for cultural sites
Key activities	<ul style="list-style-type: none"> • Benchmark the best international experience of minimum quality service standards for cultural sites • Assess key Armenia cultural sites to understand the main service standards which are needed • Do surveys among tourists to understand what quality service standards they expect • Identify KPIs for quality service standards • Create legislative basis for minimum standards of service quality in cultural-heritage sites (including parking area, toilets for tourists, etc.)
Key Performance Indicators	Approval of legislative framework about minimum standards of service quality in cultural-heritage sites in 3 years
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and sports of the RA State organs • Armenian church • Museums • Regions • Local government bodies • Tourists • Private sector
Source of funding	Public sector
Time frame	Year 2
Recommendations	This may be done based on international best practice



1.3.2. Implement quality service standards through tourism development plans at key sites

Action	1.3.2 Implement quality service standards through tourism development plans at key sites
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.3 Increase quality levels at cultural sites
Description	Implementation of quality service standards through tourism development plans at each key site
Key activities	<ul style="list-style-type: none"> • Prioritize key C&H sites for implementation of approved quality service standards • Implement quality service standards through tourism development plans at each key site • Monitor the quality service standards at each key site
Key Performance Indicators	We will have and implement quality service standards through tourism development plans for each key site in 3-10 years period
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and sports of the RA State organs • Museums • Armenian church • Regions • Local government bodies • Tourists • Private sector
Source of funding	<ul style="list-style-type: none"> • Public sector
Time frame	Since year 3
Recommendations	This may be done based on international best practice



1.4. Increase capacity of CH tourism operators

1.4.1. Develop educational and training programs for the private sector

Action	1.4.1 Develop educational and training programs for the private sector
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.4 Increase capacity of C&H tourism operators
Description	Identification and implementation of capacity building for private operators in C&H management
Key activities	<ul style="list-style-type: none"> Assess the training needs of private sector Organize educational and training programs together with universities, colleges and training centers including: <ul style="list-style-type: none"> Training of specialized guides in cultural tourism with multiple language skills Training of specialized guides in pilgrimage tourism with multiple language skills Preparing guides who may work with people with learning difficulties Raising the level of services provided by tourism staff
Key Performance Indicators	<ul style="list-style-type: none"> No. of trained staff No. of specialized guides in cultural tourism with multiple language skills No. of specialized guides in pilgrimage tourism with multiple language skills No. of guides prepared to work with people with learning difficulties Level of service by the staff as assessed by visitors' satisfaction surveys Availability of services for people with learning difficulties
Subject responsible	<ul style="list-style-type: none"> Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Armenian Church Private sector Universities Training centers Colleges NGOs Other State organs Local government bodies Tourists
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	<p>The trainings should be done based on international best practice</p> <p>The TC should decide the main program, based on priorities, such as the guides that should be trained.</p>



1.4.2. Promote international training exchange programs

Action	1.4.2 Promote international training exchange programs
Strategic objective	1. Creation of a competitive and sustainable portfolio of C&H tourism products
Specific objective	1.4 Increase capacity of C&H tourism operators
Description	Implementation of international training exchange programs
Key activities	<ul style="list-style-type: none"> Organize training exchange programs through: <ul style="list-style-type: none"> Cooperation with international cultural tourism companies, international training centers, international universities, NGOs of the sphere Cooperating with Tourism Department of EU countries by accessing EU exchange programs Elaborate international certification system of guides based on trainings and exams
Key Performance Indicators	<ul style="list-style-type: none"> Implementation of exchange program (each year at least 2 training exchange programs) International certification system of guides
Subject responsible	Ministry of Education, Science, Culture and Sports Tourism committee
Key stakeholders involved	<ul style="list-style-type: none"> Private sector Universities Training centers Colleges International organizations in C&H tourism Federations and Associations Armenian church EU Commission Other international NGOs
Source of funding	Public and private sector
Time frame	Since year 3
Recommendations	The trainings should enable to enlarge the cooperation in C&H tourism. Best organizations in the sphere should be considered for this.



2. Assurance of the market visibility and accessibility of such portfolio

2.1 Adopt effective marketing strategies

2.1.1 Develop a web cultural marketing strategy

Action	2.1.1 Develop a web cultural marketing strategy
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.1 Adopt effective marketing strategies
Description	Formulation of a web marketing strategy so as to increase the effectiveness of marketing activities in promotion the Armenia cultural tourism product in international markets, while presenting the unique ancient and rich culture and heritage of the country. The expected result is that: <ul style="list-style-type: none"> Armenia will be known abroad as the first Christian country Armenian cultural sites will be known worldwide
Key activities	<ul style="list-style-type: none"> Formulation of yearly cultural tourism web marketing plan Implementation of the web marketing plan by for instance: <ul style="list-style-type: none"> Create a dedicated section in the official tourist website of RA¹¹² Have a separate section on Armenian churches and monastic complexes¹¹³ Implement Influencer marketing, Word of mouth marketing, viral marketing and SMM. Invite international B-loggers and V-loggers
Key Performance Indicators	<ul style="list-style-type: none"> No. of separate page for C&H on the main touristic portal No. of virtual visits on the separate section on Armenian churches and monastic complexes No. of followers of social media
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Armenian Church Private sector State organs Local government bodies Tourists Population of the RA
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	The action should be a priority, as the use of internet is very big today. A marketing teams committed to social networks should be arranged.

¹¹² The information available on the official tourist website of RA is very limited. It is necessary to have a separate title in <https://armenia.travel/en: cultural-heritage tourism>, with its subsections, presenting both the values included in the representative list of the intangible cultural heritage of humanity of UNESCO, as well as our historical and cultural heritage, crafts and arts.

¹¹³ Present RA abroad as the first Christian country and offering pilgrimage routes to Christian pilgrims. It is necessary to have a separate section on Armenian churches and monastic complexes on the <http://armenia.travel/> website with pilgrimage routes, their main information, descriptions. There are 1475 churches, 610 chapels in the RA, each of which has a certain history; therefore, this heritage resource potential should be properly presented with pictures, the existing history, and also indicating the existing routes.



2.1.2 Develop a trade and press marketing strategy

Action	2.1.2 Develop a trade and press marketing strategy
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.1 Adopt effective marketing strategies
Description	Implementation of trade and press market activities
Key activities	<ul style="list-style-type: none"> • Formulation of yearly cultural tourism trade and press marketing plan • Implementation of the yearly cultural tourism trade and press marketing plan by for instance: <ul style="list-style-type: none"> - Organize fam-trips and press tours to cultural-heritage sites targeting key international markets for cultural tourism - Couple fam trips ad press tours with roadshow at origin markets - Present the cultural-heritage tourism product in international exhibitions
Key Performance Indicators	<ul style="list-style-type: none"> • Each year 2 fam-trips and press tours organized to main C&H sites • Each year 2 roadshow organized in origin countries
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee • Private sector
Key stakeholders involved	<ul style="list-style-type: none"> • State organs • Local government bodies • Tourists • Population of the RA • Armenian church
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> • The trade and press marketing should be used widely towards main target market. • Mix trade and consumer marketing. • Involve private operators in the organization, so as to obtain free accommodation services and transfers.



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2.1.3 Develop analogic marketing tools for local information provision

Action	2.1.3 Develop analogic marketing tools for local information provision
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.1 Adopt effective marketing strategies
Description	Development and implementation of analogic marketing tools mainly for local information provision
Key activities	<ul style="list-style-type: none"> • Formulation of yearly cultural tourism marketing plan • Implementation of the yearly cultural tourism marketing plan by for instance: <ul style="list-style-type: none"> - Develop tourist maps and booklets with historical and cultural monuments and relevant routes - Organize local press marketing - Organize local informational programs on local media which will present the cultural monuments and destinations - Organize local informational programs on local media which will present the cultural routes - Involve local influencers in cultural destinations
Key Performance Indicators	<ul style="list-style-type: none"> • All the monuments and routes will be fixed by maps in 3 years • Each month more than 10 news on local media about C&H sites
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Armenian Church • Cultural sites • Private sector • Media • Local government bodies
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> • The local marketing activities should include wide range of cultural values and areas. • Different types of booklets are needed: about Armenian culture, gastronomy, main places to visit, for family visits, adventure lovers, etc. • The booklets should be in English and Russian as well (for international tourists).



2.2 Make cultural heritage more accessible

2.2.1 Increase on-site accessibility through the “Accessible Armenia Tourism Plan”

Action	2.2.1 Increase on-site accessibility through the “Accessible Armenia Tourism Plan”
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.1 Make cultural heritage more accessible
Description	Formulation of a dedicated plan to ensure progressive accessibility at main cultural areas
Key activities	<ul style="list-style-type: none"> • Evaluate the necessity and urgency of developing such a plan • Surveys and interviews with main stakeholders, particularly those representing people with special accessibility needs • Creation of “Accessible Armenia Tourism Plan” including the main cultural tourism destinations • Prioritize interventions • Formulate key detailed actions at chosen cultural destination to make the sites accessible • Raise the accessibility of cultural sites for people with physical disabilities
Key Performance Indicators	<ul style="list-style-type: none"> • Three Cultural sites becoming accessible for all people each year after the 3rd year
Subject responsible	Ministry of Education, Science, Culture and Sport
Key stakeholders involved	<ul style="list-style-type: none"> • Tourism committee • Museums • Armenian church • People with special needs associations • Other State organs • Local government bodies • Private sector • Local government bodies
Source of funding	Public and private sector
Time frame	Since year 5
Recommendations	<ul style="list-style-type: none"> • The action should be implemented at first taking into account the most visited and demanded sites by tourists • A 360° design for all approach should be adopted¹¹⁴ • For the success of the actions, it is necessary to involve associations representing people with special needs

¹¹⁴ See, for instance: <https://dfaeurope.eu/>



2.2.2 Increase on-site accessibility through VR/AR

Action	2.2.2 Increase on-site accessibility through VR/AR
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.2 Make cultural heritage more accessible
Description	Implementation of VR and AR digital solutions for the valorization of cultural-heritage products
Key activities	<ul style="list-style-type: none"> • Benchmark of international best experience • Implementation of a “Digital C&H Armenia plan”, by foreseeing solutions such as: <ul style="list-style-type: none"> - VR in museums and other cultural destinations - AR in museums and other cultural destinations - Mobile apps of Armenian cultural attractions - Use of QR codes for sites - 360° accessibility to main cultural sites
Key Performance Indicators	<ul style="list-style-type: none"> • No. of virtual tours for C&H sites (at least 5 virtual tours yearly) • No. of mobile apps (including with booking opportunities), which will give the main touristic information as a virtual guide in 1 year
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • Museums • Armenian Apostolic Church Tour companies • IT companies • Other private sector operators • Other State bodies operators
Source of funding	Public and private sector
Time frame	Since year 3
Recommendations	<ul style="list-style-type: none"> • The action should be implemented building on best international experience • The action can favor the growth of the IT sector, which might be stimulated by ad-hoc incentives



3. Promote positive impacts on host community and Armenian economy

3.1 Involve local communities

3.1.1 Adopt the concept of cultural ecosystems at local level

Action	3.1.1 Adopt the concept of cultural ecosystems at local level
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.1 Involve local communities
Description	Implementation of cultural tourism ecosystems at key C&H sites, which are associations of cultural stakeholders which recognize key local cultural values and areas, and approve local action plans to preserve them and use for promoting sustainable development ¹¹⁵
Key activities	<ul style="list-style-type: none"> • Assessment of international best practice • Elaboration of a concept of cultural ecosystems with an organizational and financial model • Choose places for launching cultural ecosystems with identification of C&H sites to be used as “pilot tests” (e.g. starting with Ashnak village – the place of apricots) • Organization of local cultural ecosystem committee • Formulation of local cultural development plans (LCDP) • Implementation of LCDP which will consider provision of micro-grants to the community to start business activities related to tourism services
Key Performance Indicators	Each year one new cultural ecosystem established at cultural areas
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Other State organs • Local government bodies of Ashnak village • Private sector Population of Ashnak • Tourists
Source of funding	Public and private sector
Time frame	Since year 4
Recommendations	<ul style="list-style-type: none"> • The action can be implemented in different regions, according to cultural areas and values of each site • The ecosystem will associate key cultural stakeholders and should dialogue with the DMO • As the concept is very much related to rural development, it might start with promotion of agricultural value, such as the tradition of apricots valorizing them as a tourism attraction in Ashnak village¹¹⁶.

¹¹⁵ As a reference, see the long-lasting tradition of Local Action Groups, which since 1990 are adopted in EU to promote rural sustainable development: https://enrd.ec.europa.eu/leader-clld/lag-database_en

¹¹⁶ It can be considered the design of an hotel based on Armenian national cultural values “Apricot hotel”, with its interior and exterior design. It will serve Armenian national dishes, as well as main activities connected with apricot (in summer time harvesting the apricot, making dry fruits, jams and other tasty things from apricot, also using the wood of apricot tree to make duduk (musical instrument), make chairs, table, and other things)



3.1.2 Introduce the National competition for the Creative Capital of Armenia

Action	3.1.2 Introduce the National competition for the Creative Capital of Armenia
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.1 Involve local communities
Description	Introduction of the competition for the annual Armenian Capital of Culture. The action is proposed building on the practice of the EU Capital of Culture ¹¹⁷ , which is proposed also by some single EU nations, such as Italy. The action operates as a catalyst for local development and cultural tourism. The competition takes place here year.
Key activities	<p>The action consists in:</p> <ul style="list-style-type: none"> • organization of a competition at the national level with the publication of a call for submission of applications by a responsible authority (which can be the Tourism Committee with the cooperation of the Ministry of Culture); • selection of the City through an open competition", meaning that cities from various regions compete with each other. Cities' candidatures will be evaluated according to a cultural programme they will have to submit; • award of the recognition, which allows for a grant recognized by the Armenia Government to implement the programme.
Key Performance Indicators	<ul style="list-style-type: none"> • Growth of tourism arrivals in awarded cities. • N. of permanent SMEs created as a result of the award
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Local government bodies • Local communities • Local tourism and culture operators and NGOs
Source of funding	Public sector
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> • It is important for cities holding the title to seek to promote social inclusion and equal opportunities and to do their utmost to ensure the broadest possible involvement of all the components of civil society in the preparation and implementation of the cultural programme, with special attention being paid to young people and marginalised and disadvantaged groups. • The title of Armenia Capital of Culture should be reserved to cities, irrespective of their size, but in order to reach a wider public and amplify the impact. It should also be possible for the cities concerned to involve their surrounding area. • The award of the title should be based on a specifically created cultural programme, which should have a strong European dimension. That cultural programme should be part of a long-term strategy having a sustainable impact on local economic, cultural and social development. • The selection criteria should be made explicit in order to provide candidate cities with guidance regarding the objectives and requirements with which they need to comply in order to be awarded the title. Those criteria should also be easier to measure in order to help the panel in the selection and monitoring of cities. There should be a particular focus on candidate cities' plans for legacy activities embedded in a long-term cultural policy strategy capable of generating a sustainable cultural, economic and social impact.

¹¹⁷ See <https://culture.ec.europa.eu/policies/culture-in-cities-and-regions/designated-capitals-of-culture>



3.1.3 Support creative tourism at local destination

Action	3.1.3 Support creative tourism at local destination
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.1 Involve local communities
Description	Promotion of creative tourism activities by involvement of youths, so to make tourists experiencing something new, by learning, doing, making something themselves, and getting to know Armenian culture better, while promoting SMEs growth
Key activities	<p>The action consists in the provision of micro-grants to creative activities related to the valorization of Armenia features, such as:</p> <ul style="list-style-type: none"> • Organization of tours or activities special for baking Armenian bread lavash; • Organization of tours or activities for learning to dance Armenian group dance kochari; • Organization of activities to weave carpets, etc.; • Work together with all stakeholders to involve more cultural activities in creative tours; • Organization of creative tours with traditional cultural tours.
Key Performance Indicators	<ul style="list-style-type: none"> • No. of new tours with creative activities (each year at least 4 new creative tour) • Level of tourist satisfaction as measured by ad-hoc surveys
Subject responsible	<ul style="list-style-type: none"> • Tourism committee • Private sector
Key stakeholders involved	<ul style="list-style-type: none"> • State organs • Local government bodies • Tourists
Source of funding	Private sector
Time frame	Since year 3
Recommendations	<ul style="list-style-type: none"> • The classic cultural tours should be changed into creative ones, by implementing some activities during tours. • The action should particularly support the National Competition for the Creative Capital of Armenia.



3.2 Introduce Armenia certified merchandising

3.2.1 Define standards for Armenia typical arts & crafts

Action	3.2.1 Define standards for Armenia typical arts & crafts
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.2 Introduce Armenia certified merchandising
Description	Formulation of standards for Armenia typical arts & crafts, so as to prevent over-commercialization
Key activities	Government should recognize standards for Armenia typical arts & crafts, to preserve their authentic cultural value. The action includes: <ul style="list-style-type: none"> Analyze all Armenian arts and crafts Make a general list of them with descriptions Promote their inclusion in tourism routes
Key Performance Indicators	<ul style="list-style-type: none"> No. of arts and crafts officially recognized No. of tourism routes encompassing Armenian typical arts & crafts
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Ministry of Education, Science, Culture and Sport Other State organs Armenian church Private sector Museums Regions Local government bodies Population of the RA
Source of funding	Public and private sector
Time frame	Year 1
Recommendations	Armenia typical arts & crafts will be presented also as souvenirs.



3.2.2 Develop certified merchandising catalogue

Action	3.2.2 Develop certified merchandising catalogue
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.2 Introduce Armenia certified merchandising
Description	Recognition of a high-quality certified catalogue of C&H merchandising, so as to promote the growth of added value in museum merchandising to be produced by licensed private operators at museum shops on site and on line
Key activities	<ul style="list-style-type: none"> • Identification of key object for museum merchandising • Formulation of certified standards for their production • Concession of reproduction rights to private operators • Sales of merchandising at museums and other cultural attractions' souvenir shops
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of certified merchandising catalogue • No. of concessions allowed for its reproduction • Value of sales of certified products per year
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • Armenian church • Cultural sites • Museums • Other State organs • Regions • Local government bodies • Private sector • Population of the RA • Tourists
Source of funding	Public and private sector
Time frame	Year 2
Recommendations	<ul style="list-style-type: none"> • Museum shops must be certified and sell souvenirs connected with museum and also Armenia. • Products might include art pieces, wearing, bags, copybooks, pens, calendars, religious items, dried fruits, wines and other things sold as souvenirs like in best museums and souvenir shops in most developed countries.



3.3 Incentivize local micro-entrepreneurship

3.3.1 Introduce micro-grants mechanism for the cultural and creative sector

Action	3.3.1 Introduce micro-grants mechanism for the cultural and creative sector
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.3 Incentivize local micro-entrepreneurs
Description	Provision of micro-grants to local arts & cultural enterprises
Key activities	<ul style="list-style-type: none"> Evaluate the need of micro grants to local arts & cultural enterprises Define criteria for providing micro grants to local arts & cultural enterprises, including for instance, restoration of old houses as guesthouses by respecting cultural-authentic designs, based on items of Armenian culture and heritage (like "Alberghi diffusi") Identification of cultural areas by the RA Government, for example in village Ashnak in Aragatsotn village, which is known for its apricot, kochari and yarushta dances, baking lavash in tonir, having also has a museum of Gevorg Chaush, and other cultural-heritage monuments¹¹⁸). Provision of micro-grants to local entrepreneurs, considering particularly to support youth and women entrepreneurship
Key Performance Indicators	<ul style="list-style-type: none"> Criteria for micro-grants in 3 years Each year providing at least 10 micro-grants to local arts & cultural enterprises
Subject responsible	<ul style="list-style-type: none"> Tourism Committee State organs
Key stakeholders involved	<ul style="list-style-type: none"> Regions Local government bodies Private sector Villages Population of the RA
Source of funding	Public and private sector
Time frame	Year 2
Recommendations	The objective of the action is to promote sustainable development of rural areas, rising the life quality of population and socio-economic life particularly in villages by involving the residents in providing typical tourism offers. In each rural area more suitable places and activities should be defined, and grants distributed to rural population who wishes to develop cultural-heritage tourism in their area, starting with accommodation but involving also other services of the C&H tourism value chain

¹¹⁸ <https://hy.wikipedia.org/wiki/%D4%B1%D5%B7%D5%B6%D5%A1%D5%AF>.

[https://hy.wikipedia.org/wiki/%D4%B1%D5%B7%D5%B6%D5%A1%D5%AF%D5%AB_%D5%BA%D5%A1%D5%BF%D5%B4%D5%B8%D6%82%D5%A9%D5%B5%D5%A1%D5%B6_%D6%87_%D5%B4%D5%B7%D5%A1%D5%AF%D5%B8%D6%82%D5%B5%D5%A9%D5%AB_%D5%A1%D5%B6%D5%B7%D5%A1%D6%80%D5%AA_%D5%B0%D5%B8%D6%82%D5%B7%D5%A1%D6%80%D5%B1%D5%A1%D5%B6%D5%B6%D5%A5%D6%80%D5%AB_%D6%81%D5%A1%D5%B6%D5%AF_\(%D4%B1%D6%80%D5%A1%D5%A3%D5%A1%D5%AE%D5%B8%D5%BF%D5%B6%D5%AB_%D5%B4%D5%A1%D6%80%D5%A6\)](https://hy.wikipedia.org/wiki/%D4%B1%D5%B7%D5%B6%D5%A1%D5%AF%D5%AB_%D5%BA%D5%A1%D5%BF%D5%B4%D5%B8%D6%82%D5%A9%D5%B5%D5%A1%D5%B6_%D6%87_%D5%B4%D5%B7%D5%A1%D5%AF%D5%B8%D6%82%D5%B5%D5%A9%D5%AB_%D5%A1%D5%B6%D5%B7%D5%A1%D6%80%D5%AA_%D5%B0%D5%B8%D6%82%D5%B7%D5%A1%D6%80%D5%B1%D5%A1%D5%B6%D5%B6%D5%A5%D6%80%D5%AB_%D6%81%D5%A1%D5%B6%D5%AF_(%D4%B1%D6%80%D5%A1%D5%A3%D5%A1%D5%AE%D5%B8%D5%BF%D5%B6%D5%AB_%D5%B4%D5%A1%D6%80%D5%A6))



4. Update of the institutional framework for cultural and heritage tourism development

4.1. Regulate cultural tourism professions and operators

4.1.1. Regulate cultural tourism professions

Action	4.1.1 Regulate cultural tourism professions
Strategic objective	4. Update of the institutional framework for cultural and heritage tourism development
Specific objective	4.1 Regulate cultural tourism professions and operators
Description	The action foresees the regulation of cultural and heritage tourism professions so as to increase the quality of tourism service provided and to accrue value generated by tourism activities
Key activities	<ul style="list-style-type: none"> • Regulate cultural and heritage tourism professions by fixing the main knowledge, skills needed from C&H tourism specialists in educational programs • Introduce coherent high level of education in cultural tourism in universities and colleges based on practical skills • Create legislative basis for preparing different kinds of guides • Use certification and licensing systems for recognizing official guides of the sector
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of legislation about certification and licensing systems for guides of cultural tourism in 3 years • No. of specialized training courses offered at universities and colleges • No. of certified cultural tourism guides in 5 years • No. of recognized qualified professionals in other specialization in culture and tourism
Subject responsible	<ul style="list-style-type: none"> • Tourism committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • State organs • Armenian Church • Universities • Training centers • College • Local government bodies • Private sector
Source of funding	Public sector
Time frame	Year 2
Recommendations	The profession is a specialized one, which will give main knowledge and skills of cultural tourism. It may be interdisciplinary, including economics, geography, history, culture, religion, languages, etc.



4.1.2. Regulate cultural tourism NGOs

Action	4.1.2 Regulate cultural tourism NGOs
Strategic objective	4. Update of the institutional framework for cultural and heritage tourism development
Specific objective	4.1 Regulate cultural tourism professions and operators
Description	The action foreseen the regulation of cultural and heritage tourism NGOs so as to increase the quality of tourism service provided and to accrue value generated by tourism activities, while also considering possible fiscal exemptions
Key activities	<ul style="list-style-type: none"> • Explore international experience of regulating cultural tourism NGOs • Analyze NGOs and their activities in cultural tourism in Armenia • Regulate the NGOs of the sphere
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of legislation about cultural NGO within 3 years • No. of NGos operating in cultural tourism
Subject responsible	Tourism committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • Other State organs • NGOs active in the cultural sphere
Source of funding	Public sector
Time frame	Year 2
Recommendations	Take advantage of international experience of countries with most advanced C&H tourism sector



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4.1.3. Regulate cultural tourism accommodation

Action	4.1.3 Regulate cultural tourism accommodation
Strategic objective	4. Update of the institutional framework for cultural and heritage tourism development
Specific objective	4.1 Regulate cultural tourism professions and operators
Description	The action is intended to promote the diffusion of quality hotels inspired by Armenian cultural values and history, such as (scattered hotels, arts B&B, etc.), by introducing regulation so as to increase the quality of tourism service provided and accrue value generated by tourism activities
Key activities	<ul style="list-style-type: none"> • Explore international legislation on cultural tourism accommodation (scattered hotels, arts B&B, etc.) • Create special conditions regulated by law, which will define the main criteria of cultural tourism accommodations • Define conditions for providing state subsidies for creating cultural tourism accommodations • Process rules for creating cultural tourism accommodations, for regulating and monitoring the sphere
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of rules for creating and implementing cultural tourism accommodations in 3 years • No. of operating cultural tourism accommodations
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee • State organs
Key stakeholders involved	<ul style="list-style-type: none"> • Local government bodies • Tourists • Private sector • Population of the RA • Rural communities
Source of funding	Public sector
Time frame	Year 2
Recommendations	Take advantage of international experience of countries with most advanced C&H tourism sector



4.2. Regulate economic cooperation between public and private

4.2.1. Regulate sponsorships and patronage to the cultural sector

Action	4.2.1 Regulate sponsorships and patronage to the cultural sector
Strategic objective	4. Update of the institutional framework for cultural and heritage tourism development
Specific objective	4.2 Regulate economic cooperation between public and private
Description	Formulation and approval of rules for technical and financial sponsorship of cultural-heritage sites
Key activities	<ul style="list-style-type: none"> Engage stakeholders to find out the need and scope of creating such rules Explore the international rules for sponsorship of cultural-heritage sites, including technical, financial and mixed sponsorships Formulate and formal approve of the set of rules for technical sponsorship of cultural-heritage sites
Key Performance Indicators	<ul style="list-style-type: none"> Approval of rules for technical and financial sponsorship of cultural-heritage sites in 3 years No. of sponsorships obtained Value of private sponsorships
Subject responsible	Ministry of Education, Science, Culture and Sport
Key stakeholders involved	<ul style="list-style-type: none"> Tourism committee Armenian church Private sector
Source of funding	Public sector
Time frame	Year 2
Recommendations	Take advantage of international experience of countries with most advanced experiences in sponsorship for the benefit of the C&H tourism sector



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4.2.2. Regulate cultural donations

Action	4.2.2 Regulate cultural donations
Strategic objective	4.2 Update of the institutional framework for cultural and heritage tourism development
Specific objective	4. Regulate economic cooperation between public and private
Description	Formulation and approval of rules for cultural donations aimed at preserving, conserving and developing C&H sites and events
Key activities	<ul style="list-style-type: none"> • Explore rules for cultural donations in different countries • Create rules for cultural donations for Armenia • Define standards, amounts for donations
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of rules for donations for cultural sites preservation, protection and development in 3 years • No. of donations obtained • Value of donations
Subject responsible	Ministry of Education, Science, Culture and Sport
Key stakeholders involved	<ul style="list-style-type: none"> • Tourism committee • Armenian church Regions • Private sector • Population of the RA
Source of funding	Public sector
Time frame	Year 2
Recommendations	Take advantage of international experience of countries with most advanced experiences of cultural donations for the benefit of the C&H tourism sector



4.3. Regulate the tourism statistics collection

4.3.1. Implement visitor statistics at cultural sites

Action	4.3.1 Implement visitor statistics at cultural sites
Strategic objective	4. Update of the institutional framework for cultural and heritage tourism development
Specific objective	4.3 Regulate the tourism statistics collection
Description	Implementation of a system for collecting visitor statistics at C&H sites
Key activities	<ul style="list-style-type: none"> • Formulation of the visitors' statistics collection plan, considering the various sources • Implementation of a visitors' statistics unit at the TC • Starting the collection of data by considering that broader statistical recording is needed based on main tourism types: cultural-heritage, pilgrimage, gastro and wine, winter sports, etc. <ul style="list-style-type: none"> ○ Define a system of data which should be collected (number of tourists by origin, age, gender, number of stays, purchased services) ○ Organize data collection via hotel facilities at cultural sites ○ Organize data collection via tourism info centers ○ Organize data collection via ticket sell service if there are places which need ticket for entrance ○ Collect statistical data periodically
Key Performance Indicators	<ul style="list-style-type: none"> • System of data collection techniques in 3 years • Collecting data on cultural and heritage tourists' in 3-5 years
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • Regions • Local government bodies • Tourism info-centers • Private sector • Universities and research centers • Hotel facilities • Cultural sites • Armenian church • Other State organs
Source of funding	Public sector
Time frame	Since year 3
Recommendations	<ul style="list-style-type: none"> • Explore the international experience of gathering statistical data on cultural tourism • Pay attention to engage all stakeholders in the process of gathering statistical data • Collaborate with communities, regions on data collection process • Collaborate with universities, research centers on data collection process • Consider the broad sources of statistical data, that can be obtained through hotel facilities, tourism info centers, tourism destinations, museums, etc., as they start to record the number of visitors based on origin, gender, age, etc. • Specify the purpose of visit, as rest and leisure is very broad and it may include many types of tourism.



4.3.2. Implement visitors and residents' satisfaction surveys

Action	4.3.2 Implement visitor and resident satisfaction surveys
Strategic objective	4. Update of the institutional framework for cultural and heritage tourism development
Specific objective	4.3 Regulate the tourism statistics collection
Description	Set up a system to monitor the visitors' and residents' satisfaction level
Key activities	<ul style="list-style-type: none"> • Identify specialized research centers for creating customer satisfaction surveys • Include residents' survey in the plan • Formulate and approve the survey's methodology to be applied at cultural tourism sites among tourists • Identify key C&H sites where surveys have to be applied • Organize surveys at cultural tourism sites • Engage university students and young researchers at doing surveys • Fix the periods for doing surveys • Evaluate survey results using various methods and programs, including evaluation of customer satisfaction score and net promoter score of cultural tourism • Organize quality research studies of cultural and heritage tourism by cooperating with research centers • Based on survey results take steps to solve the problems in order to ensure high satisfaction of tourists
Key Performance Indicators	<ul style="list-style-type: none"> • Elaboration of a survey in 1 year • Organizing a survey in 1 year in every key C&H site
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • Cultural sites management organizations • Research organizations • Universities • State organs • Local government bodies • Tourists
Source of funding	Public and private sector
Time frame	Year 4
Recommendations	<ul style="list-style-type: none"> • Surveys may be done monthly, quarterly, yearly, depending on the site, cooperating with research organizations • Results of the surveys should inform broader tourism actions • Surveys should be extended to residents, so as to monitor local satisfaction with tourism



5. Infrastructure Development for C&H Tourism

5.1. Improve support facilities and services at key C&H sites

5.1.1. Improve tourism facilities and services at key C&H sites

Action	5.1.1 Improve tourism facilities and services at key C&H sites
Strategic objective	5. Creation of efficient C&H Tourism Districts
Specific objective	5.1 Improve support facilities and services at key C&H sites
Description	Improvement of tourism facilities and services at key C&H sites
Key activities	<ul style="list-style-type: none"> Benchmark international practices of creating cultural districts Prioritization of Armenia C&H sites according to opportunity and convenience to create a cultural district Formulation of a Community-Led Local C&H Development Plan involving key public, private and third sector operators Engage investments in different fields: cultural accommodation, tour and travel operations, restaurants, handicrafts, specialty and convenience shopping, etc.
Key Performance Indicators	<ul style="list-style-type: none"> Cultural districts approved in each region in 10 years
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Ministry of Education, Science, Culture and Sport Cultural sites management organizations Private sector State organs Local government bodies Tourists
Source of funding	Public and private sector
Time frame	Year 5-10
Recommendations	<ul style="list-style-type: none"> Creation of cultural districts at key cultural sites, which will be like cultural clusters providing high integration with other economic sectors that might add value (quality arts & crafts, local gastronomy, local product merchandising, etc.) Cultural districts should keep the cultural traditions of each region Cultural districts should consist of cultural accommodations, caterings, places for cultural master classes, cultural museums, merchandising places, etc. This will preserve cultural traditions of each region and contribute to social-economic sustainable development of the whole country The creation of cultural districts should integrate with action 3.1.1 "Adopt the cultural ecosystems at local level" Community-Led Local C&H Development Plan shall refer to the EU-formalized practice (see here)



5.2. Improve infrastructures at key C&H sites

5.2.1. Improve the local transportation system towards key C&H sites

Action	5.2.1 Improve the local transportation system towards key C&H sites
Strategic objective	5. Creation of efficient C&H Tourism Districts
Specific objective	5.2 Improve infrastructures at key C&H sites
Description	Improvement of the transportation system at key C&H sites
Key activities	<ul style="list-style-type: none"> Analyze the current situation of transportation system to key C&H sites Prioritization of Armenia C&H sites according to opportunity and convenience to improve the transportation system Formulation of transportation improvement plans at selected C&H sites Engage investments for developing the transportation system at key C&H sites
Key Performance Indicators	<ul style="list-style-type: none"> Improved transportation system at key C&H sites in 10 years
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Ministry of Education, Science, Culture and Sport Ministry of Territorial Administration and Infrastructure Cultural sites management organizations Armenian Church Private sector State organs Local government bodies Tourists
Source of funding	Public and private sector
Time frame	Year 5-10
Recommendations	<ul style="list-style-type: none"> This should be done based on priority, starting from the places which are more relevant but less accessible This will make cultural sites more accessible for tourists and contribute to social-economic sustainable development of the whole country PPP solutions should be considered



5.2.2. Improve road, bulk and digital infrastructures at key C&H sites

Action	5.2.1 Improve road, bulk and digital infrastructures at key C&H sites
Strategic objective	5. Creation of efficient C&H Tourism Districts
Specific objective	5.2 Improve infrastructures at key C&H sites
Description	Improvement of road, bulk and digital infrastructures at key C&H sites
Key activities	<ul style="list-style-type: none"> Analyze the current situation of road network and infrastructures to the main cultural sites Analyze the current situation of bulk infrastructures at the main cultural sites (primary water, sewerage, waste disposal, sewage treatment facilities and means of disposal of effluent and other products of treatment, electricity and storm-water services); Analyze the current situation of digital infrastructures at the main cultural sites; Prioritization of Armenia C&H sites according to opportunity and convenience to improve the road, bulk and digital infrastructures Formulation of road, bulk and digital infrastructures improvement plans at selected C&H sites Engage investments for developing road, bulk and digital infrastructures at key C&H sites
Key Performance Indicators	<ul style="list-style-type: none"> Improved road, bulk and digital infrastructures in 10 years at key C&H sites
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Ministry of Education, Science, Culture and Sport Ministry of Territorial Administration and Infrastructure Cultural sites management organizations Armenian Church Private sector State organs Local government bodies Tourists
Source of funding	Public and private sector
Time frame	Year 5-10
Recommendations	<ul style="list-style-type: none"> This should be done based on priority, starting from the places which are more relevant but less provided with road, bulk and digital infrastructures This will make cultural sites more usable by tourists and contribute to social-economic sustainable development of the whole country PPP solutions should be considered