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ASSIGNMENT 2

TASK 4

Tourism Niches Identification and Development Plans

Niche 2: ADVENTURE AND NATURE-BASED TOURISM

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8th November 2022	*Roberto Formato, Team Leader and Tourism Development Expert*	*Arthur Grigoryan, Key expert 5, Lawyer*	1	
	Vahagn Vardumyan, Non Key Expert 1- Rural Tourism development expert	*Arsen Gasparyan, Key Expert 7 - Environmental and Social Expert / Ecologist*	1	-
5th December 2022	*Roberto Formato, Team Leader and Tourism Development Expert*	*Arsen Gasparyan, Key Expert 7 - Environmental and Social Expert / Ecologist*	2	-
18th January, 2023	*Roberto Formato, Team Leader and Tourism Development Expert Vahagn Vardumyan, Non Key Expert 1- Rural Tourism development expert*		3	-
7th February 2023	*Leader and Tourism Development Expert Vahagn Vardumyan, Non Key Expert 1- Rural Tourism development expert*		4	

Approval:

Date	Approved by	Remarks
8th November, 2022	*Daniele Fanciullacci (Chief Executive)*	-
	Viola Fanciullacci (Project Director)	-
5th December 2022	*Daniele Fanciullacci (Chief Executive)*	- -
18th January, 2023	*Daniele Fanciullacci (Chief Executive)*	-
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LIST OF ABBREVIATIONS

Abbreviation	Definition
AATA	Armenian Adventure Tourism Association
ATDF	Armenian Territorial Development Fund
AGBU	Armenian General Benevolent Union
ATI	Armenian Tourism Institute
AGG	Armenian Guides Guild
ASPB	Armenian Society for the Protection of Bird
AT	Adventure Tourism
ATTA	Adventure Travel Trade Association
ANBTB	Adventure and Nature-Based Tourism Board
AUA	American University of Armenia
AYWA	Armenian Young Women's Association
BA	Business Armenia
BMF	Bundesministerium fur Finanzen (German Ministry of Finances)
BT	Barev Trails
CBT	Community-Based Tourism
DAT	Discover Armenia Tours
DMO	Destination Management Organization
DNP	Dilijan National Park
ECA	Europe and Central Asia
EU	European Union
FDI	Foreign Direct Investment
FPWC	Foundation for the Preservation of Wildlife and Cultural Assets
GoA	Government of Armenia
HA	Hike Armenia
ICB	Investment Competitiveness Benchmarking
IDeA Foundation	Foundation for Initiatives for Development of Armenia
IPA	Investment Promotion Agency
ITCG	International Training Center of Guides
JT	Janapar Trail
JV	Joint Venture
KFSR	Khosrov Forest State Reserve
LT	Legends Trail
MES	Ministry of Emergency Situations
MoE	Ministry of Economy
MTB	Mountain biking
NBT	Nature-Based Tourism
NGO	Non-governmental Organization
NPM	New Public Management
PAs	Protected Areas
PPP	Public Private Partnership
PSP	Private Sector Participation
RA	Republic of Armenia
RRISEP	Regional Research Institute for Social and Economic Policy
SPNA	Specially Protected Nature Areas
TC	Tourism Committee
TCF	Tourism Competitiveness Framework
TCT	Transcaucasian Trail
TFC	Trails For Change
TO	Tour Operators
ToR	Terms of Reference
TSP	Tourism Service Provider
UNDP	United Nations Development Programme
USP	Unique Selling Proposition
VD	Vayots Dzor
WBG	World Bank Group
YSU	Yerevan State University

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1. EXECUTIVE SUMMARY

1.1. Articulation of the report

This 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 "**Adventure and Nature-Based 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 Adventure and Nature-Based Tourism along with a profiling of travelers, which is traced by different researches around the world. Travel motivations are investigated along with expected tourism experiences, distinguishing particularly between soft and hard adventure travelers. Among the first, different sub-niches are highlighted, including Wildlife watching, Birdwatching, Fishing, Ecotourism, Walking, Cycling, Horseback riding, Community-Based Tourism, just to mention a few that might fit the Armenia reality.

Key **data from main international markets** are provided, with particular regard to European ones (UK, Germany, France, Italy, Spain and the Netherlands), and emerging patterns are deepened. An insight is provided with regard to key issues, such as: (i) the pre COVID and post long-lasting changes brought by the pandemic; and (ii) the impact of mobile connection, that is particularly relevant for this niche, as it eases visitors' movements in remote areas, while helping performance seekers ones to check it on-time. International best practices are also analyzed, with specific regard to developing countries, including local community initiatives that take advantage from the economic benefits brought by adventure tourism. Finally, the value chain is introduced for being a tool capable to detail primary and secondary activities that can be adapted to address the specific needs of the Adventure and Nature-Based Tourism segment.

The second section analyzes the current **performance of Adventure and Nature-Based Tourism in Armenia**. It uses secondary sources, integrated – in many cases - by primary ones, to provide insights about existing and potential country attractions and activities, along with recommendations for their improvement, opportunities to attract tourists and weaknesses to overcome. Tour operators currently involved in the field at national and local level are assessed, along with relevant current experiences and profiles of international demand. Relevant experiences area described and key stakeholders examined.

The section concludes with the formulation of the **SWOT analysis** of the niche, which allows to highlight key gaps to be covered for its development. Such logical framework brings to the formulation of **Recommended Development Policies** (section four), 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 Adventure and Nature-Based Tourism products
2. Assurance of the market visibility and accessibility of the portfolio
3. Promote positive impacts on host community and Armenian economy
4. Update of the institutional framework for Adventure and Nature-Based Tourism development
5. Development of infrastructure

Each strategic objective reminds to a hand of **specific objectives**, which in turn bring to **key actions**. Each action is presented in **Annex 7 – Detail of actions** 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.

The sixth and final section provides a **sustainability assessment** of the action plan, so as to highlight possible drawbacks and risks to be prevented, along with positive impacts. These include the provision of economic benefits, the minimization of socio-cultural problems and the encouragement of community involvement, while preventing negative environmental impacts. Planning of manpower, adaptation of legislation and implementation of investment policies, and particularly micro-incentives, are also considered as essential 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

Adventure tourism apparently represents a minor tourism niche for Armenia. Some studies[1] estimates that it accounts for some 4% of tourist primary activities. Such percentage however rises to 23% when Nature-Based Tourism is added. To such extent, the mix of the two niches contributes a lot to the creation of the Armenian tourism image and is also featured by the highest growth rate among all tourism segments.

Nevertheless, analysis of the current situation of Adventure and Nature-Based Tourism shows many drawbacks, including the lack of action plans for its development and generally poor services and infrastructure. For this reason, the first pillar of the strategy coincides with the creation of a **competitive portfolio of tourism products and activities based on Adventure and Nature,** to be organized and upgraded according to international standards. Such pillar encompasses:

- The formulation of action plans for each sub-niche, including the development of transboundary tours involving long-distance hiking routes;
- The upgrading of tourism services and infrastructure at key sites and routes;
- The increase of capacity of niche operators, by developing educational and training programs particularly for the private sector and, more broadly, for representatives of Adventure and Nature-Based Tourism fields.

The development of such tourism product must be necessarily integrated by the adoption of strategies to **ensure the market visibility and accessibility of the tourism portfolio**, which represents the second strategic objective. It reminds to specific objectives, which are:

i. the adoption of effective marketing strategies, privileging web and social media marketing, along with trade and press marketing, as both are featured with excellent value for money;
ii. the involvement of domestic tourists, not only for direct economic reasons, but as part of a policy of engagement of local communities;
iii. the provision of solutions to make Adventure and Nature-Based Tourism more accessible, including the introduction at key tourism hotspots, of soft-adventure programs for people with limitations, but also the us of new digital solutions in virtual and augmented reality technologies.

Adventure and Nature-Based Tourism development has been studied by providing great attention to the **maximization of positive economic and social impact for host communities and, more broadly, for Armenia economy**, which represents the third strategic objective of the action plan. Such objective is articulated in two specific objectives. The first goes deals with the involvement of local communities, which is pursued by implementing awareness campaign at national but mostly at the local level. The second relates to the introduction of micro-grants mechanism for SMEs of the sector, paying particularly attention to youths and women involvement and leveraging on the recent trends towards self-employment which is encouraged by success stories that started circulating among practitioners of the niche.

The strategy would not be sustainable if not supported by ad-hoc adaptation and innovation of current regulatory framework applied to the sector. The **update of the regulatory framework for Adventure and Nature-Based Tourism development** thus represents the fourth pillar of the strategy, which encompasses the regulation of adventure tourism professions and NGOs, including the recognition of tour guides. These will be provided with those technical and soft skills that are currently much missing among Armenian operators, such as those regarding safety procedures and cross-cultural competences.

[1] See, for instance the draft (2019). *A Strategy for the Growth of Armenia's Tourism Sector: 2020 – 2030*. Not approved

As for other tourism niches, the implementation of the strategy and the monitoring of its results need **reliable data and statistics** which are also currently missing. To such extent, collaboration with Armenian universities, to promote direct students' involvement in such activity, is advised.

According to TOR' requests, a time schedule for the implementation of the action plan is also provided, ranging up to 10 years. Some actions are preparatory or easy-doing and should start soon. They include regulatory acts, capacity building and other soft interventions such as marketing actions. Hard interventions, including upgrading of services and infrastructures will take more time, but they should however be planned much in advance, as they require more effort, not only related to the physical implementation but also to the involvement and coordination of private actors and other institutions, as well as for implementing environmental assessments if needed.

2. CONCEPTUAL FRAMEWORK

2.1. Definition of Adventure and Nature-Based Tourism

According to the UNWTO, Adventure Tourism grew exponentially worldwide before the COVID-19 pandemic, with tourists visiting destinations previously undiscovered. This allows for new destinations to market themselves as truly unique, appealing to those travelers looking for rare, incomparable experiences[2].

Inside the fast-growing tourism market, adventure tourism is one of its fastest growing categories, with, countries in all stages of economic development prioritizing adventure tourism for market growth, because they recognize its ecological, cultural, and economic value.

To date no definition of adventure tourism exists in UNWTO literature, however the Adventure Travel Trade Association (ATTA) defines adventure tourism as "…*a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion"*[3].

► *While the definition of adventure tourism only requires two of these components, trips incorporating all three tend to afford tourists the fullest adventure travel experience – for example, a trip to Armenia that involves trekking (physical activity) through the Trancaucasian Trail (natural environment) and genuine interaction with local residents (cultural immersion).*

2.2. Profile of Adventure and Nature-Based Tourists

2.2.1.General profile

The key interest for adventure tourism is its **resilience.** Adventure tourists are indeed passionate and risk-taking. It is reported interest in destinations that have previously suffered significant commercial tourism setbacks due to natural and political events, such as Haiti, Rwanda, and Japan[4]. The Adventure Travel Trade Association reports that adventure tourism operators routinely create and offer itineraries in places such as Colombia, North Korea, Iran, Rwanda, and other destinations recovering from environmental and political stress, making these destinations accessible to travelers seeking off-the-beaten path and authentic travel experiences.

► This consideration fits with Armenia profile that is currently considered quite an **unsafe destination** due to global and local international political conditions[5].

It also attracts **high value customers**: adventure tourists are willing to pay a premium for exciting and authentic experiences. Adventure operators have reported an average of USD 3,000 spent person, with an average trip length of eight days[6]. Trip costs vary based on length, luxury and activity levels, destinations, and distance from a traveler's starting point to the trip destination.

Adventure tourism is also convenient for the **impact on local economies**. A 2014's ATTA survey[7] estimated that 65.6% of the total trip cost from an adventure package remains[8] in the destination(s) visited[9], while on

[2] UNWTO (2014). *Global Report on Adventure Tourism.* ATTA
[3] https://www.adventuretravel.biz/
[4] Adventure Travel Trade Association (July 2014), AdventurePulse: USA Adventure Traveler Profiles, Seattle
[5] For example, the "Viaggiare Sicuri" site of the Italian Ministry of Foreign Affairs recommend to avoid trips to Armenia, in particular to the Syunik and Vayots Dzor regions. Source: https://www.viaggiaresicuri.it/find-country/country/ARM - Consulted on November 11th 2022
[6] Adventure Travel Trade Association (2014), Industry Snapshot 2014, Seattle.
[7] Adventure Travel Trade Association: www.adventuretravel.biz/education/adventure-edu/ (24-09-2014).
[8] Direct income from tourism is the amount of tourist expenditure that remains locally after taxes, profits, and wages are paid outside the area and after imports are purchased; these subtracted amounts are referred to as "leakage".
[9] Based on per day spending per guest in destination.

average, of each USD 100 spent on a vacation tour by a tourist from a developed country[10], only around USD 5 actually stays in a developing-country destination's economy[11].

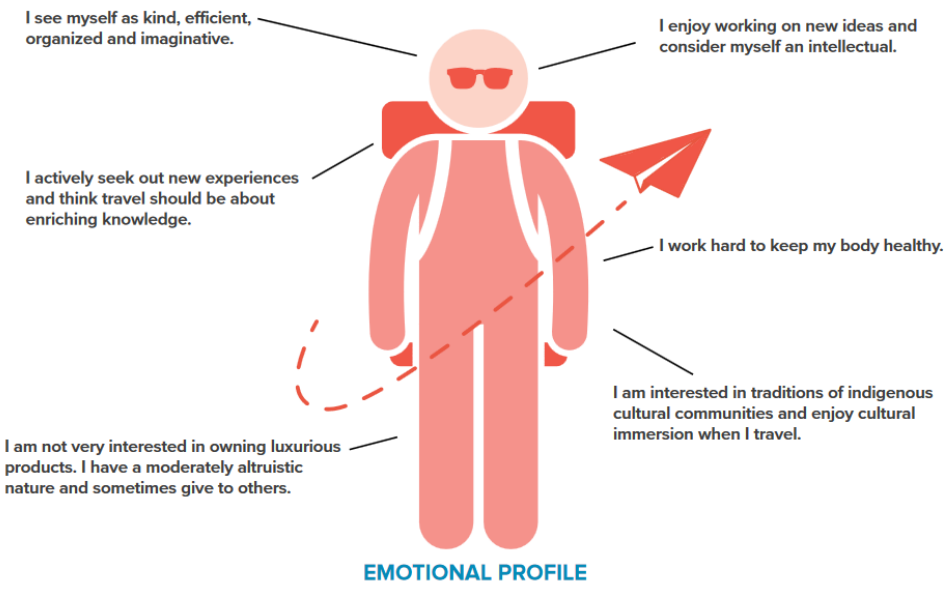

Figure 1: Profile of adventure tourist[12]

Adventure tourism is a very large tourism segment, and consists of **many niche markets**. There are however two main categories of adventure activities, **hard adventure** or **soft adventure**. Both are highly lucrative segments. In 2012 it was estimated that commercial adventure travel tour operators offering soft adventure activities charged an average of USD 308 per day. With an average trip length of 8.8 days, the average total cost of a soft adventure trip was USD 2,710 per person, not including flights[13].

According to the Adventure Tourism Market Study 2013, **57% of adventure travelers were male and 43% were female**. However, the 2014 annual global trade study, which is specific to tour operators, reflected that 53% of their travelers were female and 47% of them male[14]. The 2013 study further revealed that 37% of adventure travelers have at least a four-year degree, 11% have a professional degree, and the average individual income of an adventure traveler is USD 46,800 per year[15].

Adventure travelers continue to value international travel, with 71% of all adventure travelers (79% of hard adventure travelers) having a valid passport. A small portion of adventure travelers travel alone, 21% travel with friends, 37% travel with a spouse or partner, and 30% travel with their families, including children.

Adventure travelers rank areas of natural beauty as the most important factor in choosing their most recent destination, followed by the activities available and the climate. Non-adventure travelers ranked having friends and family at the destination as the most important factor, followed by areas of natural beauty and climate. The reasons people engage in adventure travel are diverse, but the most often cited motivations are relaxation, exploring new places, time with family, and learning about different cultures.

[10] United Nations Environment Programme (n.d.), Negative Economic Impacts of Tourism, UNEP (online), available at: www.unep.org/resourceefficiency/Business/SectoralActivities/Tourism/FactsandFiguresaboutTourism/ImpactsofTourism/EconomicImpactsofTourism/NegativeEconomicImpactsofTourism/tabid/78784/Default.aspx (24- 09-2014).
[11] UNEP cites several studies that approximately tourism leakage to be up to 40% in India, 70% in Thailand, and 80% in Caribbean countries due to factors such as foreign-owned operators, airlines, hotels, and imported food and products [Stowell, S. and Heyniger, C. (2013). Op. cit.].
[12] https://www.adventuretravelnews.com/the-evolution-of-the-adventure-traveler-study-charts-changes-2006-2016
[13] Adventure Travel Trade Association (2013), Industry Snapshot 2013, Seattle.
[14] "What is Geotourism?' (2010), National Geographic, Center for Sustainalbe Destinations (online), available at: http://travel.nationalgeographic.com/travel/sustainable/about_geotourism.html (24-09-2014).
[15] Adventure Travel Trade Association (2013), Adventure Tourism Market Study 2013, ATTA (online), available at: http://files.adventuretravel.biz/docs/research/adventure-tourism-market-study-2013-web.pdf (24-09-2014).

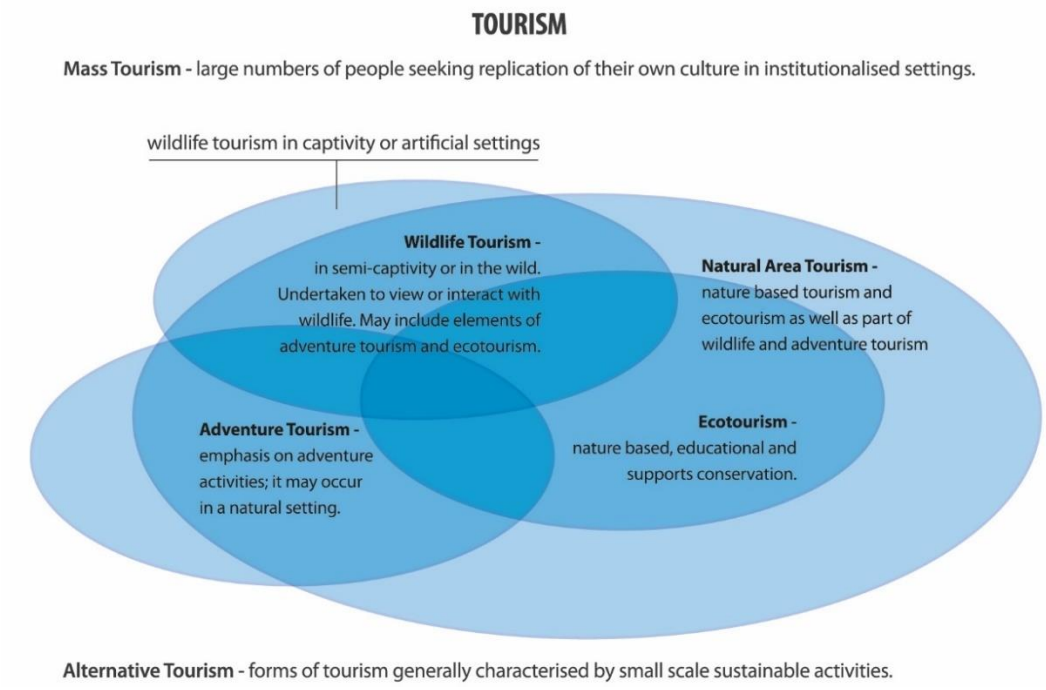

Figure 2: Mass Tourism vs. Alternative Tourism

Adventure travelers are **early adopters** by nature, meaning they are generally **willing to try new destinations, activities, and travel products**, with popular activities changing rapidly. They are very diverse, but have certain features in common. Based on age and level of enthusiasm, researches have classified four segments in adventure tourism, reported in the figure[16].

Figure 3: Adventure travel segments

With regard to European adventure travelers, it has been found that they have disposable money to spend and are well educated, with differences among age groups:

- Older European travelers are engaging more in adventure travel than they did in the past, as older Europeans remain healthy and active nowadays than in previous generations;
- European baby-boomers enjoy active holidays with culture and nature-based experiences but are most likely not be involved in hard adventure[17];
- Generation Y or millennial tourists, born between 1980 and 1995, are more likely to test new kind of experiences.

According to a 2019 Europe Assistance Ipsos survey, an impressive **59% of European millennials had at least one kind of adventure experience, like staying in a cabin in nature, camping in the wilderness or travelling around the world**. Although above the European average of 53%, European millennials are

[16] CBI (2021). *The European market potential for adventure tourism* - https://www.cbi.eu/market-information/tourism/adventure-tourism/adventure-tourism/market-potential
[17] CBI (2020). *The European market potential for babyboom tourism* - The European market potential for babyboom tourism | CBI

however less likely to experience new kinds of activities compared to American millennials (83%), Mexican millennials (81%) or Chinese millennials (77%)[18]. Together with generation Z tourists, born between 1995 and 2010, millennials are most active during their holidays, especially before having children. Adults with younger children tend to enjoy less-active holidays, but their activity returns when the children grow older or move out. Generation Y and Z tourists without children are the most likely group to enjoy hard tourism activities[19].

2.2.2. Travel motivations

Travel motivations are different among soft and hard adventure travellers. Key features are commented hereafter.

a) Soft adventure

Soft adventure travel meets the general trend to move away from passive tourism consumption and search more experiential travel with people becoming protagonist of their own holiday. This is the largest segment.

Such practice is relatively safe and hardly requires special skills and experience. Examples include backpacking, birdwatching, camping, canoeing, fishing, hiking, horseback riding, kayaking, safaris, sailing, surfing, etc. Compared to hard adventure, for tourism companies, soft adventure tourism services require less expertise and are easier to offer, but in general this also means that the competition is bigger. Also, there is less risk involved, or it is easier manageable, meaning that fewer precautions need to be taken. Finally, soft adventure travel normally requires less expensive material and less staff. Mental and physical wellbeing are also growing in importance for adventure travellers, who see their activities partly as a way to de-stress and improve physical condition.

Niche market	Description
Wildlife watching	Wildlife tourism refers to travel that is concerned with the observation of, and interaction with, animal species at the travel destination, in their natural habitats. It includes specialist niche markets and their respective passion groups, along with different types of safaris, such as 4x4, walking, fly-in, river/canoe and safaris on horseback. The niche also includes trips to view marine life.
Birdwatching	Birdwatching is defined as tourist travel for the specific purpose of observing wild birds in their natural habitats. The niche is sometimes referred to as 'birding' or 'avi-tourism'.
Fishing	Fishing tourism involves travel away from home for the primary purpose of fishing, either in freshwater or saltwater. Fishing is sometimes referred to as angling. Interestingly, there are tens of types of this tourism.
Ecotourism	Ecotourism refers to an environmentally based tourism experience that is sustainable, has low impact on the natural environment and helps to preserve the long-term nature of the community, project or site.
Walking	Walking tourism refers to trips in which walking in the natural environment forms a significant part of the trip. It includes hiking, trekking and long-distance walking, and includes specialist techniques such as Nordic walking. hiking and trekking
Cycling	Cycle tourism refers to recreational visits away from home which involve leisure cycling as a fundamental and significant part of the trip. It includes cycling types such as road cycling, mountain biking and cycle touring.
Horseback riding	Horseback riding tourism refers to horse-riding activity undertaken away from home while staying in holiday accommodation. A form of an active tourism in rural areas consisting of recreational horse-riding centres or in a field, including on a horseback, in a carriage or behind the horse
Community-based tourism	Community-based tourism (CBT) refers to tourism experiences hosted and managed by local communities, which generate direct economic benefits and are sustainable and responsible. It includes Homestays, visits to villages/communities, local festivals, learning local crafts, participation in community life. For instance, it includes "*carpet weaving experience in Gyumri*", with *Behind the Scenes Adventure* being one of the world's top adventure companies
Water sports	Water sports tourism refers to sports that take place on the water, such as windsurfing, kitesurfing, canoeing, kayaking, water skiing and coasteering.
Diving	Diving tourism refers to tourism trips for the primary purpose of scuba diving. Dive tourism includes diving activities, such as wreck diving, cave diving and free diving.
Sailing	Sailing tourism refers to any holiday where the main purpose of the trip is to sail or learn how to sail.

Table 1: Soft adventure niche markets

[18] Ipsos/Europe Assistance Survey (2019). Holiday Barometer among Europeans & Americans
[19] GFK (2016). Relaxing vs. adventure: Breaking down vacation preferences around the world

b) Hard adventure

Hard adventure travel is riskier and requires more skills and experience. Examples include caving, rock climbing and trekking. Sometimes soft adventure activities become hard adventure activities, such as kayaking in a wild river and hiking in extreme weather or at high altitudes. Danger and skill are however not firm concepts and may vary greatly depending on the tourist's own perception.

Extreme adventurers, such as base jumpers and those who cross the Greenland Ice Cap or run 100 km races, are not as much tourists as independent travelers and thrill-seekers. They constitute a remarkably small segment of the sector. Thus, although they can have public relations and marketing value for a destination or company, do not typically require attention from tourism development policymakers.

A specific form of hard adventure tourism is *thrill tourism*, which consists of activities of higher risk than other forms of travel. Mountaineering and white-water rafting are examples of activities associated with thrill tourism.

Moreover, a peculiar form of hard adventure is "*SAVE tourism*", which includes four major travel profiles: Scientific, Academic, Volunteering and Educational. The sector is featured by the acquisition of knowledge for personal or professional reasons, and volunteering is the most common link between all four profiles.

Niche market	Description
Land based adrenaline	Rock climbing, indoor climbing, mountaineering, mountain boarding, sandboarding, caving, abseiling, sand kiting, ziplining, heli-biking, ATV off road, orienteering, canyoning.
Snow and ice-based adrenaline	Snowmobiling, snow kiting, heli-skiing, glacier trekking, ski touring, cross-country skiing, snowshoeing, dog sledding.
Air-based adrenaline	Base jumping, sky diving, wing suiting, bungee jumping, hang-gliding, paragliding, micro-lighting.

Table 2: Hard adventure niche markets

2.2.3.Expected tourism experience

Expected tourism experience descend directly from travel motivations and differ among soft and hard adventure travelers.

a) Soft adventure

Low specialism adventure travelers are mostly interested in a range of **soft adventure tourism activities and like to alternate it with other activities**, like cultural excursions.

The older age groups tend to have more money and focus more on low-risk activities, although they may be looking for physically challenging activities. People between 40 and 70 account for two-thirds of the market, according to ATTA.

b) Hard adventure

High specialism adventure travelers will also be doing different activities but will probably have a **clear focus on one often hard tourism activity**. They tend to spend more money on one activity and come well prepared. They appreciate adrenaline ones, that include hard adventure activities which require a high level of expertise to take part in and usually involve an element of personal risk.

Adventure enthusiasts, such as avid kayakers, cyclists, or bird watchers, become progressively more skilled at a specific outdoor or athletic activity. These enthusiasts are described as passionate about a certain sport or activity, tending to pursue the same activity trip after trip, seeking new and exciting destinations in the process[20].

Although enthusiasts' spending is on par with other types of adventure travelers, their more frequent international trips typically last an average of one extra day. **They spend more money on equipment and gear**, because they value brands that fit their highly specialized needs, and they seek out lo-cations that are difficult to access or are upcoming but not yet popular.

Extreme adventurers spend less money, because they have their own equipment, may not seek commercial support to practice the activity, seek out locations that are difficult to access, and often camp or provide their own transport.

[20] Adventure Travel Trade Association (July 2014), AdventurePulse: USA Adventure Traveler Profiles, Seattle

► From the perspective of tourist destinations, **hard adventure is much less beneficial than soft adventure in terms of financial benefits** because it involves a minimum use of local services and products and therefore generates a lower economic impact.

Regardless of how tourism professionals organize or categorize adventure travel, adventure is a subjective term for travelers themselves, because it is related to one's individual experience. Adventure to one traveler may seem mundane to another. Adventure tourists push their own cultural, physical, and geographic comfort limits, and those limits differ for each person.

2.3. International markets and emerging trends

2.3.1. Pre-Covid trends

In 2010, the first global adventure tourism market sizing study was conducted[21]. It found that the global value of adventure tourism was USD 89 billion. The study was repeated in 2013 and found that 42% of travelers departed on adventure trips, making the sector worth USD 263 billion - an increase of 195% in two years[22].

This remarkable growth was attributed to:

- An increase in international departures;
- An increase of travelers going on adventure trips;
- An increase in average spending.

69% of overall international departures originate in Europe, North America, or South America; the same is true of adventure tourism[23].

According to ATTA, **Europe was the main source market for adventure tourism companies in Africa (43%) and Asia (30%).** South America profits mainly from North American tourists (54%), followed by European tourists (33%). Within Europe itself, European tourists were accountable for almost 60% of the adventure travelers. Adventure tourism contributes greatly to local economies: approximately 2/3 of the money spent on adventure travel stays on location. This is **approximately €350 per day per visitor on average**.

2.3.2. Post-Covid trends

Due to COVID-19, the number of Europeans travelling outside of Europe decreased by 98% in June 2020 compared to June 2019[24]. Adventure travel outside Europe had almost completely vanished. This decline was more complete in some regions than in others. While adventure tourism trips from Europe to Africa and South America was almost extinct, there were still some adventure travelers going to Asia, because Asia was generally considered to be a safer destination. In addition, regional markets recovered more quickly, so countries like Turkey and Egypt saw European adventure tourists returning earlier than long-haul destinations.

The main reason that Europeans were not travelling was due to border restrictions. Once the border restrictions would have vanished, safety would however become the most important issue. This is not only about real safety, but also the image of safety that is created in the minds of visitors. Although a destination can enhance the image that visitors have with clear communication, this image is also partly created by the country (for example, Europeans generally consider Asian countries to be safer than African countries).

► The expectation is however that **adventure travel will recover more quickly than other segments**.

There are multiple reasons for this prognosis.

- Adventure tourism involves many **small-scale tour operators**, which tend to have a very loyal group of customers. These small-scale tour operators have a high credibility and will be much more trusted when they communicate that a destination is safe, compared to some bigger tour operators.
- Adventure tourism suppliers mostly use **small-scale accommodations**, which are better at offering space and distance. These smaller companies are also more flexible, and do not need such a high occupancy ratio. Of course, the adventure tourism market is very large, and adventure tours are also offered by very big European tour operators, who will not profit from these advantages.

[21] We refer to the study conducted by ATTA, The George Washington University (GWU) and Xola Consulting. Mentioned in Adventure Travel Trade Association (2010), Adventure Tourism Market Report 2010 (online), available at: www.adventuretravel.biz/store/adventure-tourism-market-report-2010/ (24-09-2014).
[22] The George Washington University and Adventure Travel Trade Association. (2013). Adventure Tourism Market Study 2013. Retrieved from http://files.adventuretravel.biz/docs/research/adventure-tourism-market-study-2013-web.pdf
[23] Ibid.
[24] CBI (2021). What is the demand for outbound tourism on the European market?

– For adventure tourists, **travel is more important than for pure leisure tourists**. Therefore, in general they will be more eager to reschedule their trip and start travelling again.

Before the coronavirus pandemic, European residents made 10 million trips annually to other countries primarily for sports activities. The number of outbound European trips where travelers enjoy sport activities abroad but don't see it as the main reason to go on holiday, is approximately 100 million[25].

Wildlife tourism, too, has been hit hard by the COVID-19 pandemic. However, as wildlife tourism requires spacious destinations, this niche market is expected to recover faster than others. The United Kingdom, Germany, and France are the largest European source countries for wildlife tourism. As Europeans are becoming more aware of the current climate crisis, the demand for sustainability is increasing. After COVID-19 the European market for wildlife tourism will offer many opportunities, with **more tourists wanting to connect with nature and a higher demand for sustainable wildlife travel options**.

2.3.3. Trends meeting Armenia features

Among emerging trend interesting for Armenia, we highlight **Cycling and Backpacking/trekking/hiking which are activities featured with positive growth trends.**

a) Cycling tourism

Cycling tourism is on the rise across the world, with an increasing number of adventure tourists embarking on both road and mountain biking tours. According to the European Cyclists Federation[26], cycling brings in over EUR 44 billion annually to the continent, resulting from 2.3 billion cycling trips with a tourism value.

As it is less reliant on air travel, cycle tourism is considered more environmentally, socially and economically sustainable than traditional tourism. It also disperses visitors to areas that traditionally do not attract tourism and supports employment in local economies.[27] Cycling infrastructure provides an attraction to tourists and diversifies transportation options for locals.

As a result, **many destinations are investing in cycling tourism infrastructure**. In Quebec, La Route Verte stretches over 5,000 km across the province, including right through the city of Montreal[28]. The European continent is going to be connected by the EuroVelo project, "a network of high-quality cycling routes," which is used by long distance cycle tourists, as well as by local daily commuters[29].

b) Backpacking, trekking, and hiking

Backpacking, trekking, and hiking are all forms of exploring destinations on foot, often on a budget. Like cycling, these types of adventure activities are on the rise. Tourists engaged in such activities often stay in their destination longer than other tourists, thus spending more money, albeit less per day. Their expenditures often penetrate deeply into local and regional economies, helping increase the spread of tourism benefits.

The demand for this type of travel increases year after year, and while some destinations seek to attract these types of tourists, others prefer to focus on higher value clientele. Similar to skiing, the supply side of backpacking, trekking, and hiking spans the spectrum of adventure travel, from remote hikes in difficult to reach destinations, to well-trodden paths like the West Coast Trail or the Camino de Santiago, to trekking with the Gorillas in Rwanda. **It is a low-impact segment that will continue to grow and can be lucrative if destinations position the offering correctly**.

2.3.4. Impact of mobile connection

Adventure travelers are usually **high-tech tourists** (hikers, cyclists, climbers, sailors, skiers, horseback riders find their trails & spots online, especially in the case of generations Y and Z) and are more and more connected, rarely leaving without a phone or tablet to capture their holiday moment or stay in touch with loved one. This trend is breaking down geographic boundaries and allowing travelers to venture further afield than ever before, helping bring market access to adventure tourism businesses located in the most remote corners of the world.

[25] Eurostat and UNWTO numbers combined. Mentioned in CBI (2021). Op. cit.
[26] European Cyclists' Federation: www.ecf.com (24-09-2014).
[27] Ibid.
[28] Vélo Québec: http://www.routeverte.com/rv/home (24-09-2014).
[29] EuroVelo: http://www.eurovelo.org (24-09-2014).

2.4. Key specialized tour operators

Established adventure companies in North America and Europe are increasingly developing new products, opening new destinations, and commiting to sustainability to attract new clients, who frequently demand these experiences. The German tourism giant TUI Travel[30] created Peak Adventure[31] to provide desirable products to a more "*experienced and sophisticated traveler [...] seeking a more engaging and adventurous holiday than before*".[32]" Similarly, Carlson Wagonlit Travel[33] launched Journeys of Discovery[34] to provide more adventurous itineraries without diluting their brand, which is known for its Business Travel Management.

As for other tourism products, there is **disintermediation**, with the removal of the middle-man—a tour operator or travel agent—who traditionally connected the consumer in the source market to the destination market. As the traveler can access information and trusted consumer reviews online, he is more likely to go straight to the provider. The AdventurePulse - a 2014 study relative to the United States of America adventure travel market - indicated that 71% of US adventure travelers were making arrangements solely on their own[35].

If compared with non-adventure, adventure travelers were more likely to use professional services, such as guides, tour operators and boutique services. 56% of them however still handle everything on their own.

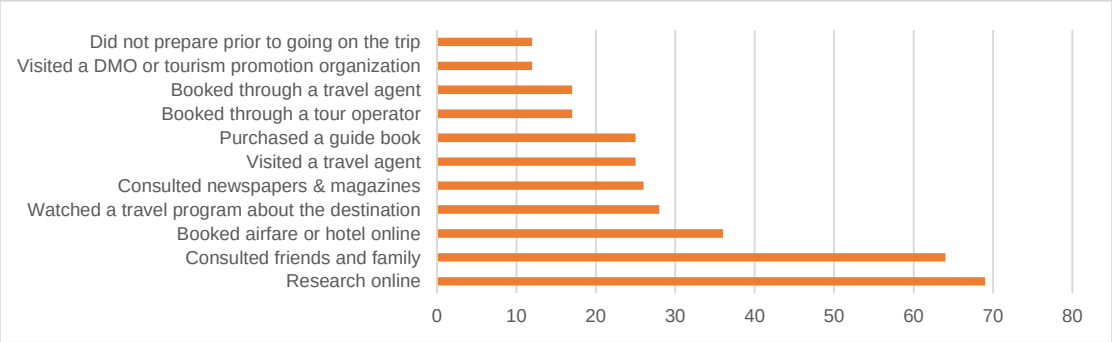

Figure 4: Ways to prepare adventure trips[36]

Based on an analysis of 279 European tour operators active in developing countries, it was found that 80% of them were active in the adventure tourism market, by offering services in at least one of the niche markets. A closer look revealed that the most important adventure tourism niche market is wildlife watching.

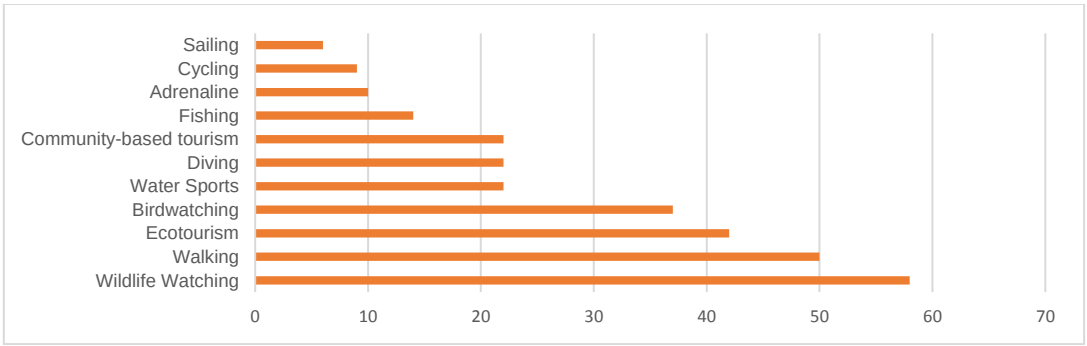

Figure 5: Percentage of European tour operators that offer services in adventure tourism niche market by type

Out of all European tour operators, 58% offered wildlife watching activities. The second largest niche market is walking (50%), followed by ecotourism (42%) and birdwatching (37%). Note that the market for soft adventure activities is much bigger than the market for hard adventure activities and the SAVE tourism market[37].

In Europe, the most important adventure tourism markets for developing countries are **the United Kingdom, Germany and France, followed by Spain, Italy and the Netherlands**.

[30] TUI Travel PLC: www.tuitravelplc.com/ (24-09-2014).
[31] PEAK Adventure Travel Group: www.peakadventuretravel.com (24-09- 2014).
[32] PEAK Adventure Travel Group: www.peakadventuretravel.com (24-09- 2014).
[33] Carson Wagonlit Travel: http://www.carlsonwagonlit.com/en/ (24-09- 2014).
[34] Carson Wagonlit Travel: http://jodtours.com/ (24-09-2014).
[35] UNTWO (2014), UNTWO Tourism Highlights 2014, UNWTO, Madrid (online)
[36] Source: ATTA (2013).
[37] Source: Molgo, EFTI. Mentioned in The European market potential for adventure tourism (2021)

a) United Kingdom

With a population of 67 million and a GDP of €2.4 trillion, the UK is it the fifth-largest economy in the world and the second in Europe. With a GDP per capita of €38 thousand per year, the British have an income above the EU average. British travelers have a strong preference for developing countries as travel destinations. According to UNWTO, the UK offers the largest adventure tourism market in Europe, accounting for 19% of the world's adventure travel tourists[38]. Among British tourists, 40% prefer active vacations. For teenagers, this share is 45%, and for tourists in their twenties 54%. Preference for sport-related activities as the main reason to go on a holiday (3.2%), however, is below the European average of 4.4%. British travelers consider their adventure trips as less sport related. Out of all British tour operators active in developing countries – 87% were active in at least one adventure tourism niche market. **The most important niche markets are wildlife watching (74%), walking (61%) and birdwatching (55%).**

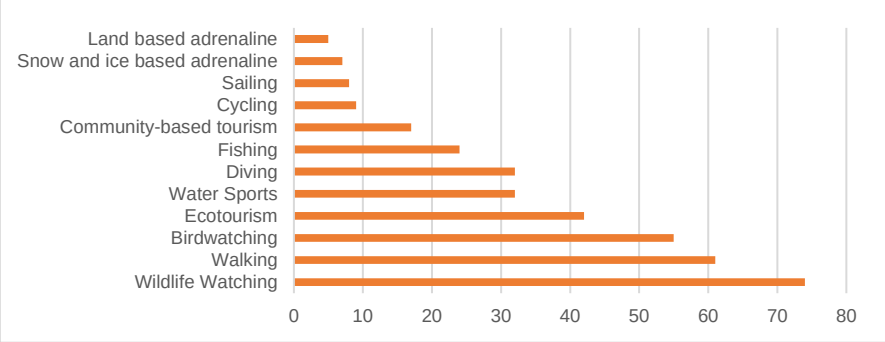

Figure 6: Percentage of British tour operators that offer services in adventure tourism niche market by type

b) Germany

Germany has Europe's largest population: 83 million. It is also the largest economy in the EU and the 4th in the world, with a gross domestic product of €3.8 trillion and €40 thousand per capita. It is the second-largest adventure tourism market in Europe, accounting for 12% of the world's adventure travel tourists[39]. Among German travellers, 5.5% prefer sport-related trips, which is above the European average of 4.4%[40]. Out of all German tourists, 32% prefer an active vacation doing and seeing lots of things, compared to 57% who prefer to relax and take it easy[41]. This means German travelers are **less active than the British and the French and prefer pure leisure holidays**. Among teenagers between 15 and 19 years, 47% prefers active vacations.

c) France

France has the third-largest population in the EU, with approximately 67 million people. It is also the EU's third economy and the seventh largest economy in the world with a €2.3 trillion GDP. A 44% share of French tourists prefer active holidays[42]. For the French, natural features are the most mentioned reason to return to a previously visited destination[43]. For French teenagers between 15 and 19, this is 50%, and for those in their twenties this is 52%. **Only 2.5% of French tourists see sport activities as the main reason to go on holiday**, which is below the European average of 4.4%[44].

d) Italy

Out the top European source markets, the Italians score second in their preference for adventure travel. With 5% preferring an adventurous trip, their preference for adventure is stronger than that of the Germans and the British[45]. **Italians have a very high preference for the cultural aspect of adventure tourism**.

e) Spain

The Spanish have the strongest preference for adventure trips, by far. With approximately 15% preferring adventure travel, their preference is about three times as high as the Italians in second place. **Just like the Italians, many Spanish prefer cultural aspects above nature**[46].

[38] UNWTO (2014). Affiliate Members Global Report, Volume 9 – Global Report on Adventure Tourism. Madrid
[39] UNWTO (2014), op. cit.
[40] European Commission (2016). Flash Eurobarometer 432 (Preferences of Europeans towards Tourism). GESIS Data Archive, Cologne. ZA6654 Data file Version 1.0.0. Brussels
[41] GFK (consulted September, 20th 2022). If you know about cultural change as it happens, you can be the first to adapt.
[42] GFK (2017). Vacation preferences: Nearly twice as many people prefer relaxing vacations to active ones
[43] European Commission (2016), op. cit.
[44] European Commission (2016). Op. cit.
[45] Brandwatch (2020). Europe Data: What the Tourism Industry Needs to Know About Changing Consumers
[46] Brandwatch (2020). Op. cit.

f) The Netherlands

The Dutch travel to developing countries and love to spend their time in nature. With 25% considering nature as the most important reason to enjoy a holiday, they rank third in their preference for nature in Europe. **Together with the British, the Dutch score especially high in the niche market of birdwatching.**

2.5. International best practices

According to ATTA, customized travel itineraries was the main trend in adventure tourism worldwide in 2019. Particularly **European travelers tend to look for unique adventure travel experiences**. This means they buy less predefined tours via tour operators, but instead determine their own routes.

Adventure travelers are also very flexible in their travel. Especially those from Generation Y and Z look for interaction and deeper engagement with local culture. They like to do and see things and are less attracted to pure leisure. An example of a unique experience is playing cricket with Maasai warriors [47]and enjoying a chat afterwards, instead of "just watching" a ritual dance. Another example is "the Big 5 Marathon"[48]: running a marathon while enjoying wildlife. Doing so would create a far more memorable story and experience then "just sitting in a jeep and looking" at wildlife. Safety and wildlife protection are ensured by carefully planning routes as well as using the marathon for raising funds for community development and wildlife conservation.

Because experiences are becoming more important, the marketing strategy of tourism companies is also changing. Many suppliers still communicate by listing services they offer for a certain price but others focus on offering experiences. These experiences should suit your targets personas, their values and their needs.

An example of a company doing this very well is &Beyond[49], whose experience is told in the box.

&Beyond

Instead of communicating deals, prices and services, this companies' communication is based on offering "extraordinary guest experiences" and promising a positive impact on the local environment. These promises of experiences are combined with amazing films of possible life-changing experiences and beautiful pictures. When you click on a destination, the website points out unique details of the destination and relates this to your personal experience. For example, Kenya is described as "spectacular natural beauty in one of the most unspoiled places on earth, but it also brings you up close and personal with Africa's most sought-after wildlife".

Another interesting example of a company focusing on offering unique and personal experiences is Paramount Journey[50] in Tajikistan. Instead of listing deals, they focus their communication on the personal experience you will have when travelling with them.

UNWTO has been building tourism development grassroots projects across the world, through programmes such as the ST-EP (**Sustainable Tourism-Eliminating Poverty**) Initiative, whose tourism development projects are aimed specifically at the community level.

Example of ST-EP project. Nepal´s Great Himalaya Trail project

*One example of a successful ST-EP project involving the community was **Nepal´s Great Himalaya Trail project**, which created a trekking route connecting to lesser-known areas, unlocking their tourism potential and turning them into lucrative economic assets for the poor communities living in these areas. The local population was trained and educated in trekking and adventure tourism, eventually creating an enabling environment for sustainable tourism development.*

Example of ST-EP project. Namibia's communal conservancy

Namibia's communal conservancy model is internationally acclaimed as tourism actively contribute to sustainability while also flourishing itself.

Not only does Namibia's conservancy program protect wildlife, natural resources, and rural communities, it provides vast economic opportunities for tourism's private sector, which then returns income to that same community through local employment and joint venture lodge agreements. Conservation NGOs, including the WWF in Namibia, work together with the Ministry of Environment and Tourism under the networking umbrella of NACSO, the Namibian Association of CBNRM Support Organizations, to support conservancy development and to achieve conservation at a national scale. Communal conservancies are registered by the Ministry of Environment and Tourism (MET) and adhere to Ministry regulations. Communal conservancies "are self-governing entities that actively manage wildlife and other natural resources, conserving them and benefitting from them economically.[51]" They are registered by the Ministry of Environment and Tourism

[47] Cricket in The Wild - Home | Facebook
[48] The Big Five Marathon - Run The Wildest Of Them All! (big-five-marathon.com)
[49] Luxury African Safaris | South America & Asia Tours | andBeyond
[50] Paramount Journey: Discover Tajikistan Paramount Journey | Adventure Trekking & Jeep Tours in Tajikistan
[51] World Wildlife Federation (2013), Communal Conservancies: Namibia's Gift to the Earth, WWF, Seattle.

(MET) and governed by a constitution, an elected management committee, a game management plan, and a benefits distribution plan. A communal conservancy consists of an area of land, marked by fixed boundaries, which are agreed upon by the founding members and neighboring communities. The land is typically split into zones, "integrating traditional resource uses with new income sources: tourism, the sustainable use of wildlife including consumptive forms such as trophy hunting and fishing as well as non-consumptive forms such as touring fishery protection areas and exclusive wildlife conservation areas.[52]"

A conservancy has:

- *a constitution*
- *an elected management committee*
- *a game management plan*
- *a benefits distribution plan*

Fifteen years after establishment of the first four communal conservancies, there are now 79, covering 19.5% of Namibia's land. One in five rural Namibians live in a communal conservancy and benefit from their rights over its natural resources. As a result of the wildlife protection that is integral to the conservancy program (game management plan), Namibia now boasts the largest free-roaming population of rhino in the world, and apex predators such as the lion, cheetah, and leopard have expanded in both range and numbers.

Namibia's Community Based Natural Resource Management (CBNRM) program has become internationally renowned since its founding in the 1990s. Conservancies are adding to rural development, employment, and livelihoods and are making significant biodiversity contributions. The continued expansion of conservancies and community forests, linked to national parks and freehold land areas under similar conservancy structures, is countering habitat fragmentation and increasing the connectivity of biological corridors at large landscape scales. For those conservancies with income, benefits are distributed in accordance with its members' wishes, as agreed at an annual general meeting. Cash distribution is rare, with conservancies usually opting to use its proceeds for a mix of benefits to the community. Examples include donations to schools, bursaries for students, food distribution to pensioners, diesel to pump water for livestock and wildlife, and repairs to infrastructure damaged by elephants.

Within communal conservancies, wildlife populations have recovered and provided the basis for more than 40 joint venture tourism lodges, 44 hunting concessions, and approximately 200 enterprises that have generated over NAD 303 million (USD 34 million) in benefits to conservancies and their members since 1998. The Namibian model is one of sustainability, based upon increasing wildlife numbers, habitat protection, and improving economic opportunities for local people. The model has energized other countries to emulate it, from Kenya to South Africa, Mongolia to Nepal, as well as United States of America (the). Benefits are being driven by recovering wildlife populations, which are still expanding and increasing in most of the conservancies. Once considered best used as poached meat for consumption, wildlife is now increasingly managed as community asset to promote wildlife watching tourism. As a consequence, Namibia's communal areas boast population recoveries of many species of wildlife that are elsewhere in severe decline in Africa. Since 1998, Namibia's CBNRM program has been working with the private sector to develop tourism in communal conservancy areas. As a result, the conservancy tourism sector has become one of the most dynamic parts of the national tourism economy. Private sector tourism in Namibia's communal conservancies is typically handled in the form of a joint venture lodge, in which an established tourism company and a communal conservancy jointly invest in a business that they manage and from which they derive profits. The community brings the availability of the land and a commitment to managing it for purposes of co-existing with wild-life, local labor interested in working at a lodge, and their unique cultural heritage. The private sector partner brings capital for construction of the lodge, as well as marketing and management expertise. The parties should consent and benefit from the partnership. The community gets jobs, training, and new skills, and the conservancy gets income for their natural resource management operations, which is a vital part of the conservancy mission. The community also learns about and gains a heightened appreciation of the role of conservation in economic development. The state benefits from community development driven from the grassroots, biodiversity protection, and improved land/ wildlife management in rural areas. The private sector benefits from a stable partner, secure access to high value land areas, and the opportunity to grow and profit from a nature-based tourism business. The conservancy program has been engaged in developing partnerships with the private sector in constructing, managing, and marketing lodges in the conservancy areas for almost two decades. Ideally the program strives for maximizing the sense of ownership and generating profits from the lodge operations.

The build, operate, transfer (BOT) approach to lodge development has been in practice in Namibia since implementation of the legislation establishing the conservancies in the late 1990s. Under the BOT system, a JV lodge agreement is negotiated between the conservancy and their private sector partner. The conservancy commits to establishing an exclusive tourism zone, with a dedicated footprint for a lodge and designated areas for wildlife viewing/photo safaris. In return, the private sector partner provides the capital and builds, manages, and markets the lodge. In addition, within the framework of their agreement, the lodge opera-tor guarantees local employment and negotiated fees paid to the conservancy, generally based on the lodge performance. The conservancy fee is important because it covers costs associated with conservancy management of the land and contributes toward community projects and/or support to local residents to offset the cost of living with wildlife. In the early days, it wasn't easy to attract investors to partner with conservancies. Because the BOT model is viewed as the least complicated arrangement, with low risk and low returns for the conservancy, it has been the favored mechanism. However, the BOT model offers the least sense of ownership and engagement by the conservancy. Thus, in recent years, the CBNRM program has been supportive of a number of more innovative business models that strive to further increase the benefits to the conservancy, the sense of involvement, and the likelihood of collective ownership over a particular business.

[52] Ibid.

Example of ST-EP project. The Luangwa Conservation and Community Fund (LCCF)

The Luangwa Conservation and Community Fund (LCCF) was established in 2009 with the mission of supporting sustainable development in and around South Luangwa National Park, Zambia. Last year, LCCF raised over USD 200,000 for local conservation and community development initiatives. Funding comes from the commitment of participating lodges to collect a guest fee of USD 10 per night, per guest. Participating lodges represent approximately 70% of the rooms available in the region, and that number is growing. These lodges and operators include Mfuwe Trails and the Bush Camp Company, Robin Pope Safaris, Flatdogs Camp, Kafunta River Lodge, Croc Valley Camp, Remote Africa Safaris, Shenton Safaris and Luangwa River Lodge.

LCCF has a clear mandate for how the funds must be spent; 50% of the funding goes to the South Luangwa Conservation Society, and 50% of the funding goes for local community development programs.

The SLCS is not just a casual part-time player in the conservation sphere. They have 72 full-time employees, most of who are working on anti-poaching initiatives, including extensive foot patrols. The South Luangwa National Park is 9,050 square km, and foot patrols can be up to two weeks in length. The SLCS works in close collaboration with the Zambia Wildlife Authority (ZAWA), which has a ranger on every patrol.

Last year, the SLCS purchased an airplane with half of the funds for this purchase price coming from LCCF. They raised the rest through donations, including substantial contributions from lodges in the area. They also raised enough to hire a full-time pilot. Flight time is split between the work of SLCS and the Zambia Carnivore Project (ZCP), a conservation NGO.

While 50% of LCCF funding from lodges must go directly to the SLCS, the other 50% is more loosely administered, and the lodges have more discretion on how to spend it. For the past two years, many of the lodges have committed their LCCF community development funding to the construction of Mfuwe's first secondary school. To date, the LCCF has funded the construction of four new classrooms, a new dormitory for students who travel long-distance and lodge at the school, new furnishings, and a new bathroom with running water, a septic tank, etc. Construction of the new secondary school has been funded almost entirely by the tourism sector in the region through the LCCF. Until this year, students had to travel two hours to the regional town to attend high school.

Examples of adventure travel offered worldwide are reported in the following table.

Soft Adventure	Hard Adventure
Green safaris in Zambia offers high-end and sustainable safaris[53]	ActiveTours offers mountain climbing tours of several days in Pakistan[54]
Tanzania birding offers bird watching experiences in Tanzania[55]	LifeTrek offers multiple-day multiple-day ski adventures in Georgia[56]
Enjoy sustainable sea-fishing with a local in Indonesia[57]	Bstoked offers paragliding all around the world, including in Morocco, Kenya, South Africa and Tanzania[58]
Three House Lodge in Costa Rica offers beachfront houses, constructed with wood from fallen trees and recycled materials, protecting a large area of rainforest and supporting the local community[59]	Tanzania Volunteers organises the placement of volunteers and interns in the local area throughout several establishments[60]
Wild Frontier Travels is a British tour operator offering walking holidays, in many developing country destinations[61]	Alp Adventures: This company specializes in hard adventure tours, including mountaineering expeditions and extreme sports adventures.
Rock, Road and Rhino offers a cycling tour through the Sahara, starting in Egypt and arriving in Sudan[62]	Secret Compass: Offering challenging adventures in remote and inhospitable regions, Secret Compass provides experiences that are both physically and mentally demanding.
Il Ngwesi offers cultural and wildlife experiences, while the profit flows back to the Maasai owners in the community[63] SurfCamps offers surf holidays to destinations like Costa Rica[64]	Jagged Globe: This UK-based adventure travel company specializes in hard adventure tours, including climbing and trekking expeditions to remote and high-altitude destinations.
Eco-Resorts, offering the possibility to watch the whale migration in Kenya[65]	Adventure Consultants: Founded by mountaineer and adventurer Guy Cotter, Adventure Consultants offers a range of hard adventure tours, including high-altitude mountaineering expeditions and polar expeditions.
Sail with Kamarind in Kenya on a dhow, a traditional Arab sailing boat[66]	Mountain Travel Sobek: This adventure travel company offers a range of hard adventure tours, including trekking, climbing, and kayaking expeditions to remote and challenging destinations around the world.

Table 3: Examples of adventure travel offered worldwide

2.6. The Adventure and Nature-Based Tourism value chain

2.6.1. The value chain concept

According to the approach recommended by the UNWTO[67], a tourism product must encompass a range of services which 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.

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.

[53] Sustainable Safari | Green Safaris
[54] Free Climbing peaks below 6500m | Active Tours Pakistan
[55] Tanzania Birding - Tanzania Birding
[56] Free Climbing peaks below 6500m | Active Tours Pakistan
[57] I Like Local (i-likelocal.com)
[58] Free Climbing peaks below 6500m | Active Tours Pakistan
[59] Search results - I Like Local (i-likelocal.com)
[60] Tanzania Volunteers - HOME
[61] Wild Frontiers (wildfrontierstravel.com)
[62] Cycling the Sahara Desert in Sudan - Cycling Adventures in Africa (rock-road-rhino.com)
[63] Il Ngwesi
[64] Surfing in Costa Rica: Your Guide to the Best Waves - BookSurfCamps.com
[65] Surfing in Costa Rica: Your Guide to the Best Waves - BookSurfCamps.com
[66] https://tamarind.co.ke/restaurant.php?tamarind-dhow
[67] UNWTO (2007). *A Practical Guide to Tourism Destination Management*. Madrid

PRIMARY ACTIVITIES	**Product development** • 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	**Destination and product packaging** • Producing marketing materials • Collectively packaging attractions of cities, areas and regions • Negotiating commission and pricing contracts with suppliers • Wholesale packaging	**Promotion** • Consumer advertising, PR and promotions • Trade exhibitions, workshops, sales visit • Marketplace representation • Familiarisation trips • Media liaison/ educationals	**Distribution and sales** • 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	**In and outbound logistics** • Visa and passport provision • Airport facilities and services • VAT reclaim • Emigration services • Check in and gate operation • Baggage handling • In-flight services	**Destination operations and services** • Airport transfers • Taxi services • Public transport • Visitor centres • Accommodation • Catering • Tours • Attractions • Car rentals • Entertainment • Health and beauty • Sport and recreation	**Aftercare** • 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 7: Components of the tourism product

2.6.2.Primary Activities for Adventure and Nature-Based 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 Attractions and activities (natural, cultural and man-made products) 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.

Key aspects for adventure travel development include:

► **Attention for unique selling points** such as the remoteness or the unexplored nature of the sites while pointing out unique details, like having the highest rocks in an area to attract rock climbers, or the most beautiful night skies when lodging is distant from a surf spot.

► As travelers are motivated by the feeling that they can improve their level of competence within the activity, product development should foresee a **bigger challenge when visitors complete the initial challenge** (such as level of difficulties for ski slopes).

- **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 theme, suggested itineraries or geographical locations.

► Adventure tourists are **willing to pay a premium for authentic, unique activities**; however, as adventure tourism products compete in global market, to remain competitive prices should either be on par with similar experiences in other countries, or the destination should clearly possess and effectively market its **Unique Selling Proposition (USP).**

- **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.

- ► Adventure travelers like challenges, but only those they know they can conquer. This implies **clearness about the level of challenge an activity offers**, through providing tour operators with sufficient information, like clear brochures including detailed photos[68].
- ► In order to promote the adventure experiences, it is also relevant **to produce stories, photos and videos** about expected activities. It should be considered to invite international bloggers and vloggers[69] while producing 360º videos and several 360º pictures of accommodation and adventure experiences, such as hiking[70] or climbing[71].
- ► As mental and physical wellbeing are growing in importance for adventure travelers, who see their activities partly as a way to de-stress and improve physical condition, it is relevant **to provide also information about health benefits generated from the tourism product**.
- ► With regard to international markets, there are **differences among adventure travel expectations**, with Germany, UK and US being the largest adventure travel markets, Dutch enjoying adventure tourism services in nature, such as birdwatching, and again UK, as well as France, Spain or Italy more interested in adventure mixed with culture in nature.

- **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. The Internet had intrinsic impacts on the adventure tourism supply chain. It has eliminated the linear nature of the chain, because tourists are now able to access any part of it online.

- ► As adventure travelers are usually **high-tech tourists**, it is fundamental to promote and distribute adventure itineraries on websites like Wikiloc[72], More Dirt[73] (for mountain bikers, while using apps, like RouteYou[74] (for hiking and cycling, but also for canoeing and more), Komoot[75] (for cycling and hiking) and ViewRanger[76] (integrated with virtual reality).

- **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.
- **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 and car rentals, entertainment, health and beauty services, sport and recreation, etc.

- ► Adventure tourists (like all travelers) are increasingly turning to the Internet to re-search, plan, book, and share their vacations. **A destination that is not well connected loses competitiveness**. Adventure opportunities need to be discoverable online and easily bookable. Destinations benefit when tourists share their experiences in real-time, which may inspire others in that traveler's network to book a holiday as well. Adventure routes and spots should therefore well-described online or in an app, with plenty of photos to make the route attractive, paying attention to specific applications used by different activities.

- **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.

2.6.3.Foundation Activities for Adventure and Nature-Based 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

[68] For example, when developing a bike route, it is necessary to provide the distance travelled, the change in altitude, the duration and the number of breaks, especially if your target group is older.
[69] 15 Best Travel Vloggers on YouTube to Follow in 2021 | The Planet D
[70] E.g. Climbing Mount Kilimanjaro in 360° | Virtual Reality 4K - YouTube
[71] E.g. 360º Climbing a 75 Meter Tree with No Rope - Pemberton - Australia 4K - YouTube
[72] Wikiloc | Trails of the World
[73] Mountain Bike Trails & Mountain Bike Events | More Dirt
[74] Enjoy the nicest routes of the United States | RouteYou
[75] The Best Route Planner for Cycling, Walking, Hiking and Running | Komoot
[76] ViewRanger is now Outdooractive!

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 efficient delivery of these activities and their performance are however a fundamental foundation for building a tourism destination and as such are vital to the destination's success. 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. In case of adventure tourism there is a higher responsibility on all the parties playing role in development, marketing, and implementation of tourism services, since the current state of emergency services in Armenia is featured as weak, and it should be in the focus of all the parties.

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 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.

► Adventure travelers are **less sensitive to deficiencies in hard tourism infrastructure**, such as airports and paved roads, but are more sensitive to soft infrastructure, such as signage, good guide training, and clean trails with professionally made proper information boards, as well as online presence of the information about destinations and routes. Adventure destinations need policies that prioritize the type of infra-structure valued by adventure tourists.

Example - Tourism Signage in Australia
Western Australia Tourism creates signage for established tourism businesses. They provide strict guidelines for the creation of signage to ensure consistency across the state. Tourism businesses, such as accommodations, attractions, wineries, historic sites, etc. can apply for the state to create the signage for them[77].

Example - Cycle Trails in New Zealand
Destinations around the world are investing in bike trails as low cost, soft infrastructure improvements that benefit both locals and tourists. The Nga Haerenga bike trails in New Zealand were first created to "provide a healthy and enjoyable way for New Zealanders and international visitors to see the country, but would also generate economic, social and environmental benefits for our communities". The funding came from the government as well as local stakeholders and communities. They created a robust website to provide up-to-date information on the trails and to enable tourists and locals to plan their trips[78].

- **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.

► **Training programs for the purpose of developing the skill sets associated with adventure tourism is very important**, both to strengthen the enabling environment for adventure tourism and to ensure optimization of the local employment and income benefits of the sector. An example of this is the AdventureEDU[79], which is a program that assists governments, destination management entities, associations, and individual tour companies in providing the adventure travel experiences, with an emphasis on safety and sustainability.

► Adventure tourists are **keen to learn about the culture of their destination, and experiencing local culture in an authentic way** is a sought-after activity. Armenia should therefore encourage local people to preserve their culture — even as modern influences continue to shape and evolve local customs — fare well with adventure travelers.

► Adventure tourists are naturally also seeking adventurous activities; not only ski slopes or hiking trails, but **also cooking classes and volunteer opportunities**. Destinations that offer a greater diversity of

[77] Tourism Western Australia (n.d.), Tourist Road Signage (online), available at: http://www.tourism.wa.gov.au/Industry_Resources/Pages/Tourist_Signage.aspx (24-09-2014).
[78] New Zealand Ministry of Business, Innovation & Employment (n.d.), About NGA Haerenga – The New Zealand Cycle Trail Story (online), available at: www.nzcycletrail.com/big-idea (24-09-2014).
[79] https://www.adventuretravel.biz/education/adventure-edu/

activities, both active and immersive, will attract more adventure tourists. To support the development of adventure resources, policies for training should be in place for specialized guiding and interpretation.

- Technology and systems development. Technology has become a driving force in support of the tourism value chain. Internet based reservation services have revolutionised 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.

► **Virtual reality (VR), augmented reality (AR) and mixed reality (MR)**[80] should be used to **provide ex-ante information** of the expected activities, with specific regard to benefits expected by adventure travelers, such as in health and well-being.

- **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.

► As mental and physical wellbeing are important for adventure travelers, who see their activities partly as a way to de-stress and improve physical condition, it is relevant to offer **healthy choices and provide information such as the calories burnt during the activity**[81]. This might also open-up opportunities to introduce in the adventure-tourist diet healthy food made out of Armenia local productions.

3. THE CURRENT SITUATION OF ADVENTURE AND NATURE-BASED TOURISM IN ARMENIA

3.1. Adventure and Nature-Based Tourism Supply

3.1.1.Key regional areas: existing and potential attractions and activities related to adventure tourism

Due to the geographical and climatic conditions, as well as the unique mountain landscapes Armenia is a very favorable country for the development and enjoyment of adventure travel. Visitors can find mountains, lakes (including high mountain and volcanic lakes), forests, rivers, gorges – in short everything that can attract adventure lovers. It has good conditions for paragliding, mountaineering, snowboarding, ski sports (not yet discovered fully and not always satisfying international demands due to lack of infrastructure), rock climbing, trekking, etc. In 2011 an international voting by "National Geographic Traveler" included Armenia in the list of top 3 best countries for extreme tourism.[82] Some of the top things to do are hiking, trekking, mountaineering, rock climbing, Jeep tours, horseback riding, paragliding, snowboarding, ski sports, and others.

Figure 8: View of Armenia

In the absolute majority of its regions (10 out of 11) there are elevations higher than 2,000 meters above sea level, and in 7 regions peaks high as 3,000 meters, in 4 regions – up to 3,500 meters, and in 2 – up to 4,000 meters[83]. This makes Armenia a paradise for hikers and trekkers, for people loving mountain climbing, biking, horseback riding and other soft and hard adventures. What makes Armenia unique is the fact that it is still considered an unknown, undiscovered, not very well-known Adventure and Nature-Based Tourism destination,

[80] The Conversation (2019), *Virtual reality adds to tourism through touch, smell and real people's experiences*, 4 March
[81] For example. a meal should include options with many vegetables or offer supplements like nutrition bars.
[82] https://araratour.com/adventure-travel-in-armenia
[83] According to observations made by analizing GIS Data previously available on the website of Green Age NGO https://www.facebook.com/greenagengo/

thus getting attention of those trying escaping from overcrowded areas. An example of a “mountain paradise” for an average mountain hiker/climber is the Geghama Mountain ridge which has 36 peaks over 3,000 mt[84]. More broadly, there are 194 mountain peaks over 3,000 mt in Armenia.

Armenia has also 7 major rivers and about a hundred smaller rivers, which can cool down in the warm season, and enrich views in the cold season. The country is also rich with amazing canyons spread through its territory and waiting for the new explorers to “domesticate” them “assigning” them for more and more types of soft and hard Adventure, and Nature-Based Tourism, such as skydiving, wingsuit flying, canyoning, etc.

Besides 3 main locations of UNESCO Heritage sites[85], which can be included in Adventure travel and Nature-Based travel packages as a priority, there is also a huge list of numerous other cultural and natural sites[86], that should be included in adventure packages. However, adventure tourism differs from cultural tourism as it’s not as easy to mention specific locations, more specific than regions where there can or are being practiced various types of adventure. This is especially because adventure tourism products are more dynamic, more flexible in terms of combinations of specific places and activities, and in general the whole process tends to be less location-specific. Thus, in many cases with this type, the main focus goes to experiences.

Annex 1, 2, 3 and 4 report respectively lists of (1) some of the most famous areas and destinations for adventure travelers; (2) main adventure tourism infrastructures; (3) locations provided with ziplines; (4) Specially Protected Areas of Nature.

Figure 9: Birdwatching at Lake Arpi National Park

3.1.2. Recommended improvements required by such attractions and activities

Activities and attractions mentioned in the Annexes are generally organized and managed in Armenia by tour operators, businesses and individuals operating in tourism industry. The destinations are managed by the mentioned stakeholders independently from the state and from each other.

- ► This would not be an issue if there would be a well-organized supervision by the State, along with a **centralized platform** to provide not only proper funding, but also expertise to players of tourism.

Despite improvements of various tourism hotspots (Dilijan-Transcaucasian Trail, Syunik-Legends Trail, etc), by organizations collaborating with the State, there is still a big gap in the field, which needs much attention and more serious further steps by the state. Below is the list of the main weak points to focus on:

- ► **Physical improvement**. Hundreds of kilometers of potential touristic routes near major tourism hotspots need physical improvement.

Figure 10: Vandalism of trail infrastructure

- ► **Signages**. Hundreds of kilometers of existing touristic routes need proper signage, many need repurposing as well, and maintenance.

[84] https://hy.wikipedia.org/wiki/%D4%B3%D5%A5%D5%B2%D5%A1%D5%B4%D5%A1_%D5%AC%D5%A5%D5%BC%D5%B6%D5%A5%D6%80 and https://www.facebook.com/photo?fbid=8743980192309284&set=a.2286752498032118

[85] Monastery of Geghard and the Upper Azat Valley in Kotayk and Ararat Regions, Monasteries of Haghpat and Sanahin in Lori Region, and Cathedral and Churches of Echmiatsin and the Archaeological Site of Zvartnots in Armavir Region

[86] http://www.mnp.am/en/environment/natural-monuments

Figure 11: Old Road Signs and Information Boards

- **Maintenance**. Hundreds of kilometers of existing touristic routes need regular and proper maintenance. Many existing adventure tourism infrastructures (such as high-risk areas and/or infrastructures like ziplines) need checking / regular supervision and maintenance (**some might need to be closed down for serious maintenance**).

Figure 12: Types of new trail infrastructure

- **Transportation**. The transportation as a whole (with almost all the parts of this segment of value chain) has to be improved, starting from the quality of roads (intercity, intercommunity, cross-country, and other roads), ending with the skills of the drivers (especially those driving 4X4 / 6X6 cars in the mountains - they call it jeeping / zeeling), and the types of the vehicles (most of the vehicles used for adventure tourism in the rural areas is often lacking simple but vital details like seatbelts), as well as the internal details such as special safe seats ad handles for visitors inside the offroad tracks, etc.
- **Bike routes**. Bike lanes in the country are currently completely inexistent. There are no markings on the roads, no signs, not even in the capital[87]. However, they are extremely needed in order to guarantee some safety to those practicing cycling of any type.
- **Horseback riding**. It needs to be approached differently, without any neglect towards safety equipment, which is the case now for the majority of rural activities: no helmets, no proper adjustable saddles, in many cases - even no proper horses (but only horses borrowed from the neighbors for a ride).
- **Certification of adventure guides**. Although there is still not much visible effort in practice, the new tourism law includes "*mandatory training and certification*" for all types of guides, including adventure ones. Thus, recently the Khosrov Forest State Reserve (KFSR) in collaboration with the Armenian State (Ministry of Environment) and Caucasus Nature Fund, started an ongoing cycle of certification of guides. This attempt gathered some attention as there have been a number of applicants, and those who passed the exams successfully - about 15-20 guides - are currently collaborating with the KFSR. The limiting factor is that their certification was aimed at making it easier for the tour operators (corporate and individual) to enter the Reserve bypassing number of obligations connected to the protection regime, as well as to make it easier for the Reserve to receive visitors. So, the certification received during these cycles does not open up the entry for those certified guides to the other State Reserves of Armenia.
- **Promotion**. From individual guides to small or medium sized homestays and other participants of the tourism field, many have difficulties to promote their products and services due to the lack of marketing skills, or the lack of resources needed for high quality promotion. This results in unhealthy competition where the opportunities and revenues of the big businesses continue growing and the starting new

[87] There was an attempt by the Yerevan municipality to create a cycling route in the city years ago, which wasn't functioning so it didn't continue.

businesses get more marginalized. Especially in the regions this leads to automatic monopolization of the different segments of adventure tourism, without letting the new players join the game. Although the significant efforts by several international organizations working in the region, aimed at developing tourism infrastructures and products have some impact on the situation, also on promotion, but for a more sustainable and continuous development - more active participation of the Government is vital.

3.1.3. Opportunities to attract tourists in such areas

- It is important to mention that **most of the main touristic hotspots of Armenia, which are well promoted for other types of tourism, have the potential to be easily rebranded (or the brand upgraded) for Adventure and Nature-Based Tourism due to very high diversity of natural areas**.

For example: it is hard to imagine a monastery which does not have at least a few trails nearby, or a small lake, pond or river within a logical distance (combinable with the site within an adventure tourism product), a beautiful place nearby with open views for taking photos, or a nearby rural home or restaurant where visitors could rest, have a nice meal and even stay if they wanted.

Off course, having all of the mentioned in the desired / preferred quality for different (also with high demands) visitors is another story, but attracting adventure tourists to an existing destination, "opening up" the site for new experiences, as a starting phase, can usually be done using what is already available, considering that adventure tourists are mostly pretty relaxed in this regard, as they are patient and forgiving in cases when the service is not as high as expected. For a landlocked country like Armenia this could be a very helpful move: rebranding the existing hotspots, enriching the visitor experiences with new things to see and do. This would also save a lot of resources, because many of the supporting (not essential) infrastructures are already there.

Some examples of rebranding considerations for existing sites of cultural tourism are here-after provided:

- **Garni Temple and Azat gorge**: river swimming, trail running[88], mountain biking (MTB) (main attractions – amazing mountain river just below the historic site, and hidden route to hike down the gorge, then hike up the hill and cycle in the area. It's a great opportunity to dive into wilderness before or after the visit of the Temple. For going further into the KFSR additional arrangements are needed).
- **Lori Berd to Stepanavan Dendropark**: cross-country biking[89] (main attractions – great scenery by the Lori Berd fortress, hidden single-tracks and wilderness trails in the gorge, relatively easy area around for cross-country - and road-cycling, good cycling distance till Dendropark which is another great place to see).
- **Geghard Monastery to Azhdahak Mountain**: trekking and camping (main attractions – amazing UNESCO site, the monastery, beautiful unexplored trails with a trailhead located in bearable distance from the monastery, and an adventurous route towards Azhdahak Mountain / Geghama Ridge with Dragon Stones and Rock Carvings on the way, and at the specific locations – camping stops).

The list can grow depending on actual tourism product requirements, and of course, the level of teamwork between stakeholders.

3.1.4. Weaknesses to overcome

As for the weaknesses of some of the sites – very important to mention the **travel time**. Northern parts of Shirak and Lori Regions, Southern and Eastern parts of Sevan Lake (technically the area of Sevan National Park), and especially Vayots Dzor and Syunik Regions, could be challenging for visitors who visit Armenia for a short period (say - between 2 and 4 days) because of the travel time required to reach those areas.

- The main issue here is not so much the factual distance but the **character of the roads**, which, even if built well (there have been recent serious improvements in this regard, throughout the country), aren't easy roads due to huge amount of serpentines in some sections (particularly in Syunik) that additionally slow down the ride and add travel time.

Therefore, for this reason, some of the experienced tour operators are gradually switching from "all Armenia at once" approach to "Armenia to enjoy" approach. As for adventure tourism, it usually requires more logistical stages which usually need more time to be effectively organized, so if in some exceptional cases the adventure tourists will find the very long road more attractive because it's adventurous, in majority of cases the tourists won't be happy with the end result of the overall product, whatever it is. This even if all the other components

[88] https://www.salomon.com/en-int/running/trail-running-advice/what-trail-running
[89] https://en.wikipedia.org/wiki/Cross-country_cycling

of the experience would be of the highest quality, because they will either be too tired to enjoy the product / experience fully, or too distracted, or both.

► A further main issue is about **safety concerns**: the lack of high-quality infrastructures, equipment and services especially in the Regions and remote areas often creates serious obstacles.

Examples include:

- Services like horseback riding, biking, skiing, which might require huge expenses for renting, transporting and bringing back the needed equipment.
- Horses might not be available for the desired time (meaning the season, period and the time of the day) due to overlaps with the regular use the rural horses have.
- Off-road vehicles might not be available for the desired time (meaning the season, period and the time of the day) due to overlaps with the regular use that those vehicles have in rural areas.
- Bicycles might not have desired quality or might have missed proper maintenance, as well as there might be safety concerns when on the road.
- Ziplines might not be fully equipped with necessary safety layers on some spots / rocks along the ziplining route (for softening the hits in possible emergency situations / failures or safety equipment).
- Hikers or trekkers might not be safe on long routes due to possibility of getting back late and not having the opportunity to be picked up by a car, as the access routes of many trails are hardly drivable.

► With regard to **accommodation**, from the perspective of adventure tourism there are some gaps to fill[90].

Here is the list of them:

- Very small percent of available accommodation venues offer adventure tours on site.
- Most of them do not have staff members with foreign language skills.
- In most of them there is a lack of bathrooms compared to the amount of bedrooms.
- There are no bicycle parkings on site, no bicycles for rent.
- There is often no awareness of the existing adventure destinations and routes around the area they are located in.
- They do not partner with other representatives of tourism industry in their neighborhood, and are often only driven by not so healthy competition principles.
- They do not have flexibility in hours of operation, so for example if a birdwatcher needs to wake up at 5am in order to catch a specific bird species, it might become a challenge for both the visitor and the owner of the accommodation, needing additional negotiations.
- The often repeat design styles and can be very kitschy in manifestations of eclectic taste with no involvement of professional designers, although this starts to change gradually.

► There is an urgent need to **train operators about minimum service standards** to accommodate international adventure travelers according to specific segments.

3.2. Tour operators involved in the adventure travel market

Platforms serving the needs of adventure travelers abroad, such as the “Tourradar”[91] features a short list of Armenian tour operators with the site menu listing the following types of adventure under “Nature & Adventure” which includes several sections (the number refers to activities in Armenia provided per type): Active Adventure (5); Wildlife (2); Bicycle (1); Hiking & Trekking (4); Ski, Snowboard & Snow (2); Beach (3); Safari (3); Festival & Events (1).

Here is the list of the mentioned tour operators[92]: The Caucasus Tours[93]; Silk Road Travel[94]; Geographic Travel Club[95]; Central tour[96]; SKR Reisen[97]; Bavaria Fernreisen[98]; Chamaeleon[99].

► It must be highlighted the **urgency of creating a main umbrella platform** to host everything available in one main place and promote it more effectively abroad.

[90] For learning about and getting inspirations from a specific type of adventure accommodations – good to look up this resource https://mostuniquehotels.com/searchresults.php?Search=Adventure
[91] https://www.tourradar.com/about-us
[92] The number of activities per type is far not the complete number of actual adventure tour organizations and activities visible to foreigners about Armenia, as it represents only a small part of it.
[93] https://www.tourradar.com/o/the-caucasus-tours
[94] https://www.tourradar.com/o/silk-road-travel
[95] https://www.tourradar.com/o/geographic-travel-club
[96] https://www.tourradar.com/o/cental-tour
[97] https://www.tourradar.com/o/skr-reisen
[98] https://www.tourradar.com/o/bavaria-fernreisen
[99] https://www.tourradar.com/o/chamaeleon-reisen

With regard to the typologies of tourism experiences offered, foreign tour operators (and about the half of the local major ones) usually offer multi-country packages (Armenia-Georgia-Azerbaijan) with minimum of 5-6 days (1-2 countries), maximum about 15-17 days packages that involve all the 3 countries. There are also this type of combinations: (1) Georgia-Armenia-Iran[100]; (2) Iran-Armenia-Georgia; (3) Georgia-Armenia-Azerbaijan-Turkey[101].

Annex 5 provides a list of local tour operators, compiled using the Tripadvisor platform and referred to local knowledge. The list is however not complete as there are numerous other organizations (both formal and non-formal) which are new but noticeably active, but still are underrepresented in the field.

Recommendations for improvement for the local tour operators and other service providers which are a part of tour package creation, marketing and implementation process, which might be delivered by the TC include:

- Add **more regional diversity** (involve more regions of Armenia) in adventure tourism packages.
- **Avoid mixing up field classifications / naming**, as well as merging separate types too much (when aiming to fit into the available demand for products under certain labels).
- Be more open to new local and regional initiatives such as Transcaucasian Trail [102] and HikeArmenia, which are not very corporate in their essence, but much more **philanthropic**, and bring new value and spirit to the overall tourism field, especially to Adventure and Nature-Based Tourism segments.
- **Support independent local and international initiatives** such as Trails for Change[103], in their endeavors of refurbishing, creating and maintaining existing and new adventure tourism infrastructures, mainly focusing in the regions which are in the most need in this regard.

Figure 13: Trail building summer camp

- **Unite efforts** to compensate the lack of resources that aren't possible to gather and invest via mentioned channels and initiatives, or by the state support. This includes collaborating in forms of (themed) cooperatives to crowd-fund some of the most vital and missing infrastructures.

Key infrastructure encompass*:* Hiking / trekking routes/trails*;* Biking/mountain biking routes/trails (mountain, cross country)*;* Dirt-bike racing grounds (for enduro motorcycles)*;* Bicycle lanes (urban)*;* Pumptracks (Mtb)*;* Horseback riding/equestrian routes/trails (mountain, cross country)*;* Proper camping grounds and campsites; Mountain huts/Forest huts/Treehouses; Rock climbing routes; Indoor/outdoor climbing gyms; Mountaineering equipment shops and rentals outside Yerevan (as Yerevan has already enough)[104]; Horseback riding grounds; Ziplines; Treetop-walking parks; River-crossing training gyms; Different types of trail bridges[105]; Glampings; Hanging hotels; Armenian traditional house replicas (Hazarashen)[106]; Wigwams; Teepees; Themed parks, Co-working spaces in the regions (there is a very high demand and very little offer currently).

Figure 14: Donation boxes

[100] https://araratour.com/package/cultural-tour-to-georgia-armenia-and-iran
[101] https://www.best-of-caucasus.com/us/
[102] https://transcaucasiantrail.org/en/home/
[103] https://www.trailsforchangengo.org/
[104] According to https://www.rei.com/learn/expert-advice/backpacking-checklist.html they should include Hiking boots or shoes, Backpacks, Tents, Sleeping bags and sleeping pads, Stoves and fuel tanks, Kitchen supplies, Plenty of backpacking food types (can be a great wayt to utilize the local food), Water bottles and water-treatment supplies, Weather-appropriate clothing, Emergency and hygiene supplies, Small repair kits, Maps , Navigation devices, Power banks, The Ten Essentials (https://www.rei.com/learn/expert-advice/ten-essentials.html)
[105] According to https://www.fs.usda.gov/t-d/pubs/htmlpubs/htm07232816/page10.htm they include Cable bridges, Deck girder/truss bridges, Side girder/truss bridges—pony-truss bridges, Arch bridges—deck or suspended bridges, Miscellaneous single-unit bridges.
[106] https://www.armgeo.am/en/armenian-hazarashen/

Figure 15: Camping ground infrastructures

Figure 16: Tourism Gear Shop at Yerevan

3.3. Relevant current experiences

The following list of initiatives represents the main Adventure and Nature-Based Tourism physical infrastructures:

a) Transcaucasian Trail[107]

Figure 17: Transcaucasian Trail

It will be a world-class, long-distance hiking trail more than 3,000km in length, following the Greater and Lesser Caucasus Mountains and connecting roughly two dozen national parks and protected areas in the region.

Here's the list of the main sections of the Transcaucasian Trail in Armenia:

#	Name	Length / km
1	Dilijan National Park	80
2	The Geghama Mountains	114
3	Vayots Dzor	181
4	Syunik	150
1-4	(The full Thru-hike)	861 [108]

Table 4: Main sections of the Transcaucasian Trail in Armenia

b) The Legends Trail[109]

It is a new network of trails in Syunik region in the South of Armenia. Syunik is one of the least-visited places in Armenia and the South Caucasus and this trail takes through some truly mind-blowing spots along its route.

The Legends' Trail spans around 250 kilometers from historic Khndzoresk all the way to majestic Khustup mountain[110]. Along the way, the tourist is greeted with cultural, natural, and historical sites… many with ancient legends! Here's the list of the routes:

#	Name	Length / km
1	Baghaburj to Storot to Mount Khustup Trail	14,6
2	Halidzor to Tatev Trail	14,1
3	Khot to Halidzor Trail	10,6
4	Tatev to Bardzravan Trail	15,8
5	Goris to Karahunj to Khot Trail	14,5
6	Old Bells of Goris Trail	12,1
7	Goris to Kapan Trail	150,0
8	Magic Forest Loop Trail	5,5

[107] https://transcaucasiantrail.org/en/about/
[108] The 336km of the total 861 kms are connecting sections and not yet fully pulished parts
[109] https://absolutearmenia.com/legends-trail-syunik/
[110] https://hikearmenia.org/all-trails

Table 5: Legends' Trail routes

c) *Barev Trails*[111]

It was a 3-year cooperation project between Wesser Foundation and WWF Armenia. Each year over 60 volunteers took a journey to mountainous Armenia to work in Protected Areas such as Khosrov Forest State Reserve, Gnishik Protected Landscape, Tatev Planned National Park and Zangezur Biosphere Complex, and to create trails. Here's the list of the routes:

#	Name	Length / km
1	Barev Trails Tatev	4,5
2	Barev Trails Arpa	2,8
3	Barev Trails Jermuk	8,4
4	Barev Trails Dsegh	7,3

Table 6: Barev Trails' routes

d) *Dilijan Trails Network*[112]

The Dilijan Tourist Information Centre is the central point of the project that was a major shift in the refurbishment and development of the existing trails network in Dilijan National Park, around Dilijan town and surroundings. The website of the information center is where you can find information about all the 13 official routes, accommodations and things to do in the area. Here's the list of the routes:

#	Name	Length / km
1	Parz Lake Loop Trail	1,9
2	King of the Forest Trail	3,6
3	Skywalk Trail	16,2
4	Whispering Waterfall Trail	6,2
5	Monk's Trail	1,4
6	Tripeak Trail	12,1
7	Yew Grove Trail	3,0
8	Apakeqar Trail	5,5
9	Sky Mirror Trail	9,5
10	Trail of Reflection	5,9
11	Nature Pilgrimage Trail	12,0
12	Hidden Waterfall Trail	3,2
13	Medieval Monasteries Trail	3,5

Table 7: Dilijan Trails' routes

Some of these routes overlap with the 80km long (for 4–5 days of hiking with camping) section of the Transcaucasian Trail[113] crossing the Dilijan National Park.

Figure 18: Birdwatching trips

[111] https://barevtrails.com/the-project/
[112] https://visitdilijan.com/things-to-do/outdoor-activities
[113] https://transcaucasiantrail.org/en/hike/dilijan-national-park-armenia/

3.4. Adventure and Nature-Based Tourism Demand

With regard to **international demand**, it can be observed that most of adventure travelers arrive in Yerevan via air, so that is where their experiences start. While it is more typical for the western travelers to arrive with already clear plan of travel in their mind, there is a growing tendency of more flexible planning in cases of both – western and eastern travelers. Partially this is because the character of adventure travel itself goes in tact with the principle of exploring the unknown, and at the same time, one can assume that they might have given up searching for desired information and facilities online[114] (as there aren't that many in fact) and decided to take the chance to just arrive and improvise.

Statistically every 3rd or 2nd backpacker just books the accommodation in Yerevan or somewhere nearby for a part of their stay, leaving the majority of remaining days flexible and continuing to arrange it all on the go. An average adventure traveler tends to escape Yerevan almost immediately, within 2-3 days, depending on the full duration of stay, in order to manage to see as much of the country as possible.[115]

For backpackers and hitchhikers, who are more skilled to travel in challenging, Armenia is a real playground to challenge skills of intercultural communication, orienteering and navigation. This becomes a good part of their overall experience, and only in a very few reported cases it has been a relatively unpleasant experience.

► Analyzing the sightseeing experiences and available resources in the regions, we can state that, according to the feedback collected through a research conducted in 2020[116], **many famous Armenia tourism destinations do not provide what the average tourist is expecting, or provide it but not in the expected quality**.

Below is a table reporting satisfaction at visited destinations and activities by interviewed travelers.

Destination					
Echmiatsin	**Tatev**	**Sevan**	**Sanahin**	**Geghard**	**Areni/Noravank**
33,3%	19,2%	34,6%	19,2%	40,7%	23,1%
33,3%	30,8%	30,8%	7,7%	33,3%	15,4%
20,0%	19,2%	7,7%	34,6%	18,5%	19,2%
3,3%	3,8%	11,5%	7,7%	3,7%	3,8%
3,3%		11,5%	7,7%		11,5%
6,7%	26,9%	3,8%	23,1%	3,7%	26,9%

Legend	
	Fully satisfied
	Satisfied
	Neutral
	Not satisfied
	Displeased
	I don't know

Table 8: Visitors' satisfaction with Armenia tourist destinations

Activities included visiting famous historical sites, walking, hiking, enjoying wilderness and so on. Although most of the tourists were generally satisfied with the mentioned activities, some tourists were either neutral or did not imagine what else could be offered to them on sites, especially in Sanahin, Areni and Tatev.

► This shows that there are **very few additional ideas / activities to attract tourists**, on the other hand, according to interviews, the promotion of those places was pretty limited.

The geographical distribution of both foreign and local adventure tourists between the regions of Armenia is uneven, and here's how according to approximate observation it looks like, region by region, part by part:

a) Shirak – mostly Gyumri (5-6 kms radius from the center of the city) and a number of suburbs, Lake Arpi National Park in about 30 kms to the north-west.
b) Lori – mostly the southern, eastern and central parts, almost excluding the western and majority of northern areas.
c) Tavush – mostly the south western and central parts.
d) Aragatsotn – mostly the south-eastern and central parts.
e) Kotayk – most of the region, excluding the high-mountain areas of Geghama Mountain Ridge for soft adventure travelers but hard adventure lovers also visit that area frequently.
f) Gegharkunik – mostly the western and North eastern shores of Lake Sevan, part of the central area of the Region.
g) Armavir – Mostly the eastern part.
h) Yerevan as a region by itself is perhaps the most touristic in terms of the museums and urban infrastructures which are useful also for adventure travelers to some extent, but Yerevan always gets about 1-3 days of the overall experience.
i) Ararat – mostly the northern, central and western parts.

[114] https://asue.am/amberd/publication/analytics/armenia-in-the-eyes-of-the-tourist-1
[115] https://www.lostwithpurpose.com/armenia-budget-report/
[116] https://mineconomy.am/media/12644/HAVELVAC_3.pdf

j) Vayots Dzor – almost all of the region besides the very north partially.
k) Syunik – most of the Region often excluding the very south due to excessive travel time and undeveloped accommodation and other tourism services.

And if to use ranking of the regions by the approximate amount of tourist visits, based on personal expert observation of tourism destinations that are usually included in tour packages, here is what we get: (1-10, where 1 is most visited and 10 is least visited)[117]: 1. Yerevan[118], 2. Kotayk: 3. Tavush; 4. Gegharkunik; 5. Lori; 6. Vayots Dzor; 7. Ararat; 8. Aragatsotn; 9. Armavir, 10. Shirak; 11. Syunik.

With regard to domestic demand, available statistics do not allow for a knowledge of its figure and behavior.

3.5. Key Stakeholders

Tourism stakeholders include all the actors reported in the figure. We will however distinguish among the Government, other public stakeholders, private operators and NGOs.

Figure 19: Typology of tourism stakeholders[119]

3.5.1. The role of government

As well known, strong and interconnected political structures are the basis for growth of the tourism industry with appropriate policies in place to encourage investment, cooperation and goodwill.

As highlighted in other reports of the present assignment[120], the tourism sector of Armenia continues to show good indicators of improvement and, according to pre-Covid forecasts, it was supposed to grow greatly with continued support from the government. The COVID-19 and then the 44-day war however brought a major setback to the processes. Now, with the gradual rehabilitation of tourism from COVID-19, and with hope that this region will finally get into more peaceful state, there is a chance for renewal of the pre-Covid-19 positive dynamics in the field. **It will depend, even more the before, on strong and sustainable collaboration of all the possible stakeholders, along with the representatives of the tourism value chain[121]**.

Below is a list of stakeholders supporting the development of tourism in Armenia, which involves state bodies

Typology of cooperation	Public Stakeholders			
Primary	Ministry of Economy (all matters related to tourism)	State Tourism Committee (all matters related to tourism)	Ministry of Foreign Affairs (international cooperation)	Ministry of Territorial Administration and Infrastructures (cooperation with local governance bodies)
	Statistical committee of RA (e.g. arrival days. various statistical the data about tourists, etc.)	Local self-governance bodies	Ministry of High Technological Industry (e.g. Road infrastructures, aviation etc.)	Ministry of Education, Science, Culture and Sports (e.g. organization of events, preservation of heritage etc.)

[117] As this can differ from product to product, from season to season, and there are other factors affecting the evaluation, this will need further research.
[118] Yerevan is in this list first of all because due to its importance because of being the main transportation hub of the country, not because of being a top adventure tourism destination, although it does have a number of attractions representing the field.
[119] https://mineconomy.am/media/12644/HAVELVAC_3.pdf
[120] See Assignment 1, Task 1.2 "Local Context Analysis"
[121] It is worthwhile to mention that in 2017, it was established the Tourism Development Fund of Armenia. It was responsible for the development of Armenia's tourism policy and programs and aimed to implement tourism marketing policies and to ensure development of the field by introducing Armenia as an attractive tourism destination to global and domestic markets. However, the fund closed in 2018.

	Yerevan Municipality	Ministry of Environments	
Secondary	Ministry of Labor and Social Affairs (Social Packages)	Ministry of Finances (e.g. Legislation, etc.)	Ministry of Defence
	Ministry of Emergency Situations of RA (Civil emergency situation services)	Ministry of Environments (e.g. environmental issues, nature-based tourism, etc.)	Ministry of Justice
Other	Urban development committee	State Revenue Committee	
	Police	Other State related stakeholders (upon demand)	

Table 9: Government-related adventure tourism stakeholders and competences[122]

3.5.2. Other actors

Although today the contribution of Adventure and Nature-Based Tourism to the overall tourism in Armenia is not so significant – about 4%[123], nevertheless the great potential of this niche tourism types promises opportunities to expand and diversify the sector, and thus is attracting different new players.

The Government will continue to play a pivotal role but Adventure and Nature-Based Tourism development will hopefully growingly depend on the attraction of smart private players – the TOs and TSPs. Currently, the evidence shows that the field is getting more and more attention by various stakeholders, and it is now gradually entering training and development projects run also by international organizations in Armenia.

A list of main actors is reported in Annex 6.

Please note, key private actors are already reflected upon in Annex 5 (Local Tour Operators), while key NGOs were mentioned at § 3.1.3.

3.6. SWOT analysis

Strenghts
- Many beautiful natural sites with a great potential for Adventure and Nature-Based Tourism - Many interesting historical-cultural sites - Existing accommodation infrastructure in the regions close to wilderness areas - Diversity of weather conditions in the country offering a good variety of options for different visitor preferences - Rich biodiversity - Various species of animals can be observed the reserves, including Bezoar Goat, Eurasian Lynx, Brown Bear, Vultures etc. - Birds can be watched at many parts of the country - Presence of a PA holding a European Diploma of Protected Areas from the Council of Europe, making Armenia the first country in the region, which was awarded European Diploma of Protected Areas - Candidates of Emerald site (KFSR) - Existence of a number of UNESCO Sites, as well as natural sites included in the list of the European natural heritage (KFSR) - Growing number of new adventure tourism products - Gradual improvement of the level of professionalism among tour operators and individuals, guides and other service providers in terms of Adventure and Nature-Based Tourism
Weaknesses
- Poor socio-economic conditions in the regions of Armenia - Poor guiding and other Adventure and Nature-Based Tourism services as a result of a lack of professional training of the guides (and rangers in case of PAs where entry requires guidance by rangers) - Poor road infrastructures - Lack of high-profile tourism activity in comparison with international conditions and expectations of travelers - Lack of important tourism information materials, trails, infrastructure - Lack of visitor infrastructure (including clean and hygenic public toilets by the tourism hotspots) and practical tourism products - Lack of trained tourism staff especially in many accommodation facilities in the regions - Lack of qualified local guides

[122] https://mineconomy.am/media/12644/HAVELVAC_3.pdf
[123] RA (2019). *A Strategy for the Growth of Armenia's Tourism Sector: 2020 – 2030*. Draft

- Lack of volunteer programs to outsource some tasks using less resources - Lack of effective marketing of existing tourism products and destinations, including the PAs - Lack of informative, bilingual signage in touristic areas / hotspots or roads bringing to them, on main roads, communities nearby tourism hotspots, and elswhere where it's needed - Lack of business partnerships between the representatives of the adventure tourism field - Lack of waste management in areas of tourist visitation - Lack of public transportation to tourism sites - Lack of high quality professional online visibility of many tour operators - Lack of collaboration with IT professionals for creation of up-to-date online resources and phone apps for tourism - Lack of First Aid equipment and trained staff among tour operators and other representatives of the tourism field - Lack of high-quality accommodation and food services nearby many tourism hotspots - Lack of collaboration between tour operators and local communities - Lack of integration / cooperation of tourism development and nature protection activities - Lack of waste management - Lack of public resources for sustainable financing for those initiatives which create and maintain various infrastructures useful for Adventure and Nature-Based Tourism, and tourism in general - Lack of law enforcement - Lack of enforcement capacities for respect of regulations on different sites, especially in PAs - Lack of sufficient numbers of qualified staff in various organizations representing the field or being a part of the value chain - Lack of any continuous structured research and basic knowledge on Adventure and Nature-Based Tourism potential of the PAs, and surrounding communities - Lack of state funding and dependency of foreign grant projects, as well as on volunteer work - Lack of professional multilingual visitor management in most of the PAs, and some of the regional museums - Lack of physical marking / defining structures of PAs boundaries so visitors might actually enter a PA without knowing it, and get fined. - Lack of eco-friendly green transportation within the PAs, which regularly results in disturbances of wildlife and makes the conscious visitors feel guilty for ordering a particular tour product that potentially harms the nature - Lack of skilled rescue staff at the local rescue service - No accessibility for people with limited opportunities including physical challenges in most of the tourism hotspots - No prior scientific assessment of tourism carrying capacity of the PAs and surrounding natural areas. - Very little integration of PAs of Armenia into tour planning of companies and individual tourists - Shortage of tourism expertise and workforce at all levels including ecotourism infrastructure creation, maintenance and development, compared to the actual needs of the country in such specialists - The culture of creating revenues/income from tourism is not developed well, especially among accommodation facility owners - Often not enough financial benefits for those who are already involved in tourism because of bad organization and lack of structured efforts - Entry and booking related issues when collaborating with some of the PAs (lack of trust among touristic companies, unsatisfactory pricing policies, not matching with the quality of service at some PAs) - Dirty industries in the vicinity of tourism hotspots which weaken perceived image of natural areas
Opportunities
- Growth of adventure travel at the international level - Growing international interest in Armenia as Adventure and Nature-Based Tourism destination
Threaths
- Potential impact of tourism on biodiversity - Illegal hunting (poaching), unregulated entry into the PAs from remote locations which are hard to control for the PAs staff - Threat of increased pollution on and around the tourism hotspots - Consumerist mentality of tourists (mostly the locals) without attention paid to waste disposal - Possible new wave of COVID 19 pandemic and new restrictions' cycle which will reduce / stop the inflow of foreign visitors to Armenia - Reduction of foreign grant - Increased competition from international adventure tourism destinations, especially with countries of Transcaucasian region - Possibility of a new escalation of Armenia-Azerbaijan conflict (the ongoing unclaimed by Azerbaijan war) or another armed conflict in the region, which can again reduce the number of incoming tourists - Probability of dangerous encounters with snakes during the snake mating season and other wild species[124]

Table 10: SWOT analysis of Adventure and Nature-Based Tourism in Armenia

[124] In case of any accidents, including snake bites, the condition of back-country / intercommunity roads is often not good to organize quick rescue services, or there are no roads at all in some areas. This can result in serious complications

3.7. Key gaps to be filled for Adventure and Nature-Based Tourism development

Following the SWOT analysis, we can highlight gaps that must be covered to support the development of the Adventure and Nature-Based Tourism niche and represent the logical framework for the strategy.

- Gap 1: Lack of a national strategy for Adventure and Nature-Based Tourism development;
- Gap 2: Underdeveloped tourism infrastructure;
- Gap 3: Lack of unified information and market identity;
- Gap 4: Untapped economic potential;
- Gap 5: Inadequate institutional, administrative and legislative framework;
- Gap 6: Lack of coordination and communication between stakeholders;
- Gap 7: Lack of awareness and recognition in the local communities and the public sector;
- Gap 8: Lack of quality control across operators;
- Gap 9: Lack of guiding capacity and staff skills to correspond the market expectations;
- Gap 10: Burdensome administrative procedures and relatively low level of services related to tourism;
- Gap 11: Poor nature conservation and waste management.

4. RECOMMENDED DEVELOPMENT POLICIES

4.1. Strategy

4.1.1. Development objectives and policies

The key strategic objective is to develop Adventure and Nature-Based Tourism in Armenia based on the principles of balanced improvement of niche segments of these fields in Armenia, while preserving the biodiversity, nature-monuments, historical-cultural monuments, as well as considering the principles of Europarc Charter[125], especially in cases of involving the Armenian PAs in development of tour packages.

The pillars of the strategy, which correspond to its strategic objectives are:

1. **Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products**
2. **Assurance of the market visibility and accessibility of the portfolio**
3. **Promote positive impacts on host community and Armenian economy**
4. **Update of the institutional framework for Adventure and Nature-Based Tourism**
5. **Explore the needs and possibilities for adventure and nature-Based Tourism infrastructure development in Armenia, in order to gradually improve them**

4.1.2. Specific objectives

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

1. **Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products**
   - 1.1. Formulate a complete Adventure and Nature-Based Tourism Strategy including specific sub-niches
   - 1.2. Upgrade tourism services and infrastructure at key Adventure and Nature-Based Tourism sites and routes
   - 1.3. Increase capacity of Adventure and Nature-Based Tourism operators
2. **Assurance of the market visibility and accessibility of such portfolio**
   - 2.1. Adopt effective marketing strategies
   - 2.2. Involve domestic tourists
   - 2.3. Make Adventure and Nature-Based Tourism more accessible
3. **Promote positive impacts on host community and Armenian economy**
   - 3.1. Incentivize local micro-entrepreneurs
   - 3.2. Increase awareness about Adventure and Nature-Based Tourism
   - 3.3. Increase capacity of Adventure and Nature-Based Tourism operators
4. **Update the institutional and legislative framework for Adventure and Nature-Based Tourism development**
   - 4.1. Regulate Adventure and Nature-Based Tourism professions and operators
   - 4.2. Regulate access to PA

[125] https://www.europarc.org/library/europarc-events-and-programmes/european-charter-for-sustainable-tourism/

4.3. Regulate the tourism statistics collection

5. **Development of infrastructure for Adventure and Nature-Based Tourism**
   5.1. Audit of the existing infrastructures and development of master plans for hard infrastructure refurbishment/upgrades
   5.2. Implementation of infrastructure improvement projects

4.1.3.Locations for development

Key locations for Adventure and Nature-Based Tourism development include:

#	Key locations	Sub-niches		Timeframe for development
		Soft adventure	Hard adventure	
1	Gyulagarak and Lori Berd extended communities in Lori Region, with main focus on exploring the potential of Dzoraget and Urut River Canyons	Hiking, Birdwatching, Wildlife watching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Rock climbing, Mountaineering, Trekking, Cross-Country Skiing, Mountain biking, Snowshoeing, Paragliding, 4X4 off-roading, Caving, Orienteering, Base jumping	3-5 years
2	Lake Arpi National Park with adjacent communities of the PA's support zone and beyond, along the Akhuryan River Canyon in Shirak Region	Hiking, Birdwatching, Wildlife watching, Ecotourism, Fishing, Canoeing, Kayaking, Free diving, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Ski-touring, Cross-country skiing, Mountain biking, Snowshoeing, Dog-sledding, 4X4 off-roading, Paragliding, Orienteering, Rafting, Canoeing, Kayaking, Free diving	5 years
3	Debet extended community towards Gyulagarak area, in Lori Region, including Debed Canyon (starting from Vanadzor up to Odzun)	Hiking, Birdwatching, Wildlife watching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Rock climbing, Cross-Country Skiing, Mountain biking, Snowshoeing, 4X4 off-roading, Paragliding, Caving, Orienteering, Base jumping, Rafting, Canoeing, Kayaking	3-5 years
4	Talin area and surroundings of Aragats Mountain in Aragatsotn Region	Hiking, Birdwatching, Wildlife watching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Ski-touring, Mountain biking, Cross-country skiing, Snowshoeing, Ziplining, 4X4 off-roading, Paragliding, Caving, Orienteering, Base jumping, Sky diving, Wing suiting	5-7 years
5	Ijevan area with Ijevan State Sanctuary and areas to the east from there, in Tavush Region Eastern and southern parts of Gegharkunik Region	Hiking, Birdwatching, Wildlife watching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Ski-touring, Cross-country skiing, Snowshoeing, Caving, Mountain biking, 4X4 off-roading, Paragliding, Ziplining, Orienteering, Windsurfing, Kitesurfing, Canoeing, Kayaking, Free diving, Base jumping, Cave Diving, Sailing	3-5 years
6	Western part of Armavir Region	Hiking, Birdwatching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Mountain biking, Snowshoeing, Ziplining, 4X4 off-roading, Caving, Paragliding, Orienteering	3-5 years
7	North and East of Kotayk Region, including Tsakhkadzor	Hiking, Birdwatching, Wildlife watching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Mountain biking, Ski-touring, Cross-country skiing, Caving, Snowshoeing, Dog-sledding, Ziplining, 4X4 off-roading, Paragliding, Orienteering	3-5 years
8	Northern, Eastern and central parts of Ararat Region	Hiking, Birdwatching, Wildlife watching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Mountain biking, Snowshoeing, Caving, Ziplining, 4X4 off-roading, Paragliding, Orienteering	5-7 years
9	The mountainous areas between Yeghegnadzor and Arin communities in Vayots Dzor Region	Hiking, Birdwatching, Wildlife watching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Mountain biking, Cross-country skiing, Snowshoeing, Caving, Ziplining, 4X4 off-roading, Wing suiting, Paragliding, Orienteering	5-7 years
10	Mountainous areas in the North from Spandaryan Reservoir, and surroundings of Meghri, in Syunik Region	Hiking, Birdwatching, Wildlife watching, Ecotourism, Walking, Cycling, Horseback Riding, CBT	Mountaineering, Trekking, Mountain biking, Cross-country skiing, Snowshoeing, Canyoning, Caving, Ziplining, 4X4 off-roading, Paragliding, Base jumping, Wing suiting, Orienteering	5-10 years

Table 11: Key locations for Adventure and Nature-Based Tourism

4.1.4.Infrastructure development

In the past few years (starting from 2015) there have been a number of major improvements in the development of Adventure and Nature-Based Tourism related infrastructures in Armenia, more specifically – refurbishment of existing routes and creation of new routes, which already brought those areas to a whole new level.

This process started in Dilijan National Park (Tavush), and spread further on to most of the other regions of Armenia (mainly – Lori, Vayots Dzor, Syunik, Kotayk, Aragatsotn, Shirak). At the beginning it was designed the Transcaucasian Trail long distance hiking trail exploration and created the prototype, supported by the Royal Geographic Society of UK and funded by the Landrover grant.

Then with reception of the first funding from the Caucasus Nature Fund, followed by another grant from the Diasporan Armenian Hovnanian Foundation, it laid the fundament for the already more sustainable local initiatives of infrastructure development such as Trails For Change, Hike Armenia, Transcaucasian Trail Armenia, etc. In parallel to the mentioned collaborative and mutually beneficial projects there started a number of others such as Legends Trail in Syunik, Barev Trails in Syunik, Vayots Dzor and Lori, Janapar Trail in Armenia and Artsakh (this one existed earlier but developed greatly until the 44 –days war in 2020th which resulted in termination of the Artsakh section due to the suffered collossial losses), and some others.

Besides the mentioned structured long term efforts of infrastructure development, Armenian Adventure and Nature-Based Tourism field has also seen significant advancement by separate teams in terms of development of new types of tourism products such as paragliding, hot-air-balooning, rafting, sub-boarding, diving, mountain biking, motorcycling and touring, horseback riding, 4X4 touring, historical and educational quest-touring, wilderness explorations, birdwatching and animal watching, as well as mountaineering with a continuous growth of professionalism in the process that can be seen in all the directions – starting from the amount of newly created mountaineering clubs annually, ending with frequency of foreign trips bringing Armenian mountaineers to conquer higher peaks of the World.

Although the Covid-19 pandemic greatly interrupted the new developments, it also stimulated reinvention of the local tourism market, which is now giving interesting results by even helping to compensate the seasonal lack of foreign tourism activity in the country. Multiple parallel initiatives of guide training in Yerevan and the regions have been helping to introduce important skill-sets to especially the young population, although without a strict age limit, staying open for people of all ages who are interested in tourism field.

Technological development and growing availability of photo-video filming tools and softwares, high quality photo-video cameras, filming drones and gadgets resulted in creation of better-quality photo-video materials every year, helping the locals in promoting the country with higher quality content. Although some of the tourism field representatives were initially skeptical about the positive role of long-distance hiking and biking infrastructure in the country for the local businesses, the developments that followed prove the contrary and now there is a growing interest towards all types of infrastructure development projects, both phylantropic (Transcaucasian Trail) and purely business type.

Based on the mentioned, those local organizations and groups, which have already become local experts in such projects, are now taking a leading role in the further advancement of all the achievements, getting better connected to local businesses and to each other, going into long term partnerships and expanding their teams.

With all the mentioned, it is still early to say that Armenia has overcome the main challenges connected to infrastructures, but it is right to say that a serious step has been made.

4.2. Key Actions

In order to reach specific objectives, key actions can be defined. They are reported in the synoptic scheme hereafter. Each action will be further analyzed in the next chapter.

Strategic objective	Specific objective	Key action
1. Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products	1.1 Formulate a comprehensive strategic plan for the development of Adventure and Nature-Based Tourism in Armenia	1.1.1. Formulation of a complete Adventure and Nature-Based Tourism Strategy Plan for Armenia with regard to specific sub-niches
		1.1.2. Develop Transboundary tours involving long-distance hiking route
	1.2 Upgrade tourism services and infrastructure at key Adventure and Nature-Based Tourism sites and routes	1.2.1 Definition of a standard model of tourism services for Adventure and Nature-Based Tourism
		1.2.2 Implement tourism services by formulating actions plans for each Adventure and Nature-Based Tourism sub-niche and key sites
	1.3 Increase capacity of Adventure and Nature-Based Tourism operators	1.3.1 Provide environmental education of local guides and other local service providers
		1.3.2 Provide trainings to the representatives of Adventure and Nature-Based Tourism fields
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
	2.2 Involve domestic tourists	2.2.1 Develop tour packages for domestic tourism
	2.3 Make Adventure and Nature-Based Tourism more accessible	2.3.1 Introduce soft-adventure programs for people with limitations in key tourism hotspot
		2.3.2 Increase on-line accessibility through VR / AR experiences
3. Promote positive impacts on host community and Armenian economy	3.1 Incentivize local micro-entrepreneurs	3.1.1 Introduce micro-grants mechanism for Adventure and Nature-base tourism operators
	3.2 Increase awareness about Adventure and Nature-Based Tourism	3.2.1 Implement awareness campaign at national and local level
4. Update the institutional and legislative framework for Adventure and Nature-Based Tourism development	4.1 Regulate Adventure and Nature-Based Tourism professions and operators	4.1.1 Regulate adventure tourism professions
		4.1.2 Regulate adventure tourism NGOs
	4.2 Regulate access to Protected Areas	4.2.1 Create a functional well-organized payment system for entry to PAs
	4.3 Regulate the tourism statistics collection	4.3.1 Implement visitor statistics at Adventure and Nature sites
		4.3.2 Implement visitor and resident's satisfaction surveys
5. Development of infrastructure for Adventure and Nature-Based Tourism	5.1 Analysis and Diagnosis	5.1.1 Audit of the existing infrastructures
		5.1.2 Development of master plans for hard infrastructure refurbishment/upgrades
	5.2 Implementation	5.2.1 Implementation of infrastructure improvement projects

Table 12: Adventure and Nature-Based Tourism Action Plan

5. SUSTAINABILITY RECOMMENDATIONS

5.1. Enhancing economic benefits

UNWTO has acknowledged that Adventure and Nature-Based Tourism delivers benefits to every level of society because of its documented benefits to the environment, local people, and local economies, so that government are increasingly identifying it as a tool for sustainable and responsible economic growth[126]. Such benefits range from creating local jobs rapidly to relying on traditional knowledge of local people for guiding and interpretation.

Building on such assumption and on international experiences, the action plan has been devised so that to maximize economic benefits on the communities that host the Adventure and Nature sites and on the broader Armenia economy as well. As we know from other reports, such as "Local Context Analysis", tourism has already a great socio-economic significance for the country and such impact will be enhanced by interventions foreseen to promote the present niche tourism.

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

- Upgrading of the offer:

► **The action plan foresees the formulation of a comprehensive strategic plan for the development of Adventure and Nature-Based Tourism in Armenia considering various locations as mentioned at § 4.2 Its implementation will make the niche more attractive and competitive on the international sphere**;

► **Such strategy will be integrated by sub-strategies for each niche of Adventure and Nature-Based Tourism;**

► **The action plan foresee the development of Transboundary tours involving long-distance hiking routes;**

► **The action plan foresees to introduce minimum quality service standards at Adventure and Nature-Based Tourism sites and routes, which will increase the value for money provided to visitors;**

► **The action plan foresees the implementation of low-cost marketing activities (web cultural marketing strategy, trade and press marketing strategy) which are usually featured with high financial returns compared to investments;**

► **The action plan foresees to increase online accessibility to Adventure and Nature-Based Tourism sites through VR/AR applications, which will stimulate tourism demand and might be associated to special commercial offers.**

- Involvement of SMEs and residents in tourism services provision:

► **The action plan foresees the introduction of micro-grants mechanism for the Adventure and Nature-Based Tourism operators, along with the implementation of an awareness campaign that will promote youths and women' participation.**

5.2. Preventing socio-cultural problems and encouraging community involvement

Particularly rural communities, especially in remote areas, can be impacted both positively from tourism through jobs, economic activity and improved social services but also negatively 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. [127]

The evidence shows that in case of Armenia valuable touristic experiences – according to international standards (from rafting to horseback riding) – are not yet so well-known by rural residents, so that there is the risk for them to be neglected or misinterpreted, thus interrupting any development. Examples are:

- Misunderstanding of preferred living and touring requirements of different types of visitors, which can often lead to dissatisfaction;

[126] UNWTO (2014). Op. cit.
[127] World Tourism Organization (2004). *Indicators of Sustainable Development for Tourism Destinations*. Madrid: WTO

- Poor level of knowledge about other cultures and culture-specific behaviors, which may lead to misunderstandings in everyday activities and in organization of different leisure activities, especially in public spaces

The way the locals perceive adventure might also not always correspond to what the visitors may expect, and this can lead to poor customer satisfaction rates (for example locals may interpret lack of safety gear and infrastructures as an additional value in terms of potential adventure, but that is dangerous and is not true). Examples are:

- Lack of proper use of necessary equipment (or absence of safety gear / equipment), lack of safety instructions, as a result of baseless belief that nothing will happen;
- Lack of proper planning of various complex tourist activities as a result of again baseless belief that everything will somehow work out.

So, for an effective community involvement there is a need to address the main gaps in cross-cultural competences of the locals who are either already involved in niche tourism, or plan to be involved:

► **The action plan foresees continuous training and workshops for representatives of Adventure and Nature-Based Tourism fields**.

The action plan also put great emphasis on increasing community attitudes to tourism, by involving community in tourism planning and respecting local values. It foresees to let locals interact with foreign visitors in day-to-day circumstances, both as part of tourism activities, and as separate, specially organized events, for example taken care by the local governments, using the spaces they have (community halls, schools etc).

This would also help to reduce depopulation especially in remote rural areas, where people face disproportionally high level of social challenges coupled with low level of cultural life. Adventure and Nature-Based Tourism activities would thus help to diversify and improve the life of small rural communities which are mainly in desperate need of interesting and motivational events / happenings. It is a matter of fact that most of the tourism related trainings and other activities organized within the past 7 -10 years in Armenian regions received mainly very positive feedback, first of all because of the mentioned ability to diversify the life in villages.

► **The action plan foresees a specific objective to involve local communities through awareness campaigns, that will promote communities' participation**.

In order to enhance the socio-cultural benefits of Adventure and Nature-Based Tourism development numerous steps should be considered, which are satisfied by the action plan:

- Increasing community attitudes to tourism, by involving community in tourism planning and respecting local values:

► **The action plan foresees a specific objective to involve local communities through awareness campaigns, that will promote communities' participation**.

- Making Adventure and Nature-Based Tourism services available to the community too:

► **The action plan foresees to increase accessibility to Adventure and Nature-Based Tourism sites through development of adventure programs for people with limitations in key tourism hotspot, from which will directly benefit people with special needs living in local communities.**

- Involving residents in Adventure and Nature-Based Tourism activities:

► **The action plan foresees the development of tour packages specifically targeted to attract domestic tourism.**

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

► **The action plan foresees to implementation of residents' surveys to monitor local satisfaction with tourism activities.**

5.3. Preventing negative environmental impacts

In many destinations, adventure tourism has been indeed developed without extensive new infrastructure. On the contrary, it can contribute positively to the preservation and protection of rural and natural sites through restoration of available assets, such as trekking routes, in order to be used by visitors.

Adventure tourists are generally seeking pristine natural environments and bio-diverse habitats to explore, and these require high levels of protection by governments. Although adventure tourism is widely viewed as a

green sector (environment-friendly), its dependence on natural resources however can make negative impacts more conspicuous. Therefore:

- It must be ensured that adventure practice do respect the so-called "The Leave No Trace Seven Principles for Outdoor Ethics, which are often summarized by the consumer-oriented tagline "Take only photographs, leave only footprints." Such Principles are a tourism-specific program marketed to tourists and widely adopted by operators in their policies and client education practices:

► **Plan Ahead and Prepare, Travel and Camp on Durable Surfaces, Dispose of Waste Properly, Leave What You Find, Minimize Campfire Impacts, Respect Wildlife, Be Considerate of Other Visitors**[6.]

Adventure tourism infrastructure and massive growth of the industry especially near the biodiversity hotspots, specially protected areas, forest ecosystems, and other key sites for nature conservation can lead to harming wildlife and habitat degradation. **Especially large-scale interventions may be a subject of Environmental Impact Assessment**.

Building hiking trails, and biking routes in the natural environment is currently not subject to Environmental Impact Assessment (excluding the territory of specially protected nature areas). Nevertheless, they can have a significant negative impact on biodiversity, including wildlife disturbance, damage to vegetation cover, and soil erosion.

► **Thus, necessary guidelines and regulations should be developed to avoid irreversible damage.**

It is important to implement initiatives engaging nature lovers and tourists in nature conservation and citizen science activities. In particular, an essential number of cases of illegal logging and poaching in the country are reported by local and international visitors, which can be preventive.

5.4. Manpower planning

Destinations focusing on adventure as a key niche segment work to provide professional education for adventure travel companies to support local people in participating in the tourism economy.

Numerous standards and training programs exist to prescribe how to lead various types of adventure activities from a technical perspective (e.g. the technical aspects of rock climbing or white water rafting). However, a globally recognized standard describing the many requirements of an excellent adventure travel guide—from technical proficiency to group management and cultural interpretation—does not yet exist. Adventure travel operations and the technical and non-technical challenges they carry vary widely by the location, size, scope, activity, environment, and length of the experience. Adventure travel guiding is multi-faceted, complex work, drawing on interpersonal skills, technical skills, and local knowledge.

Guides are perhaps a tour operator's most important resource. They are on the front lines with guests during a trip and bear responsibility not only for guest safety, but also guest learning and enjoyment. They also perform a valuable marketing service for companies, differentiating one adventure tour operator's services from another by creating the memorable experiences and personal connections that inspire guests to return to travel with the same company repeatedly, even as the destinations they visit may vary.

The plan therefore assumes the qualification of Adventure and Nature-Based Tourism operators as a pre-requisite for achieving above described social and economic benefits. It therefore dedicates broad attention to such issue:

- Youths and women are encouraged to increase their skills and competences in Adventure and Nature-Based Tourism related activities, etc.:

► **The action plan pursues the specific objective of increasing the capacity of Adventure and Nature-Based Tourism related operators, through developing environmental educational and providing training of local guides and other local service providers.**

- All representatives of Adventure and Nature-Based Tourism related fields are encouraged to take part at continuous training programs:

► **The action plan foresees, more broadly, to provide trainings to the representatives of Adventure and Nature-Based Tourism fields.**

5.5. Adoption of consistent legislation

In adventure tourism, certifications exist to validate the technical performance of guides in specific activities. Below are a few of the leading technical certification bodies:

- Rafting: The International Rafting Federation (IRF);

- Mountaineering: International Mountaineering and Climbing Federation (UIAA), American Mountain Guides Association (AMGA);
- Rock climbing: American Safe Climbing Association (ASCA);
- Canyoning: International Canyoning Organization for Professionals (ICOPro), American Canyoneering Academy.

► Many other activity-specific technical safety certifications exist. However, it is important to note that **none of the certifications described carry the rule of law**, although they are widely recognized by sector practitioners.

The valorization of the Adventure and Nature-Based Tourism niche might therefore be favored by the adoption of proper legislation, which is considered in the present report:

- Recognition of Adventure and Nature-Based Tourism professions and operators:

► **The action plan foresees to regulate Adventure and Nature-Based Tourism professions and operators, especially NGOs operating in the field;**

- Regulation of payment for entering PAs:

► **The action plan foresees to regulate payments for entering Pas, thus providing also additional revenue for their management.**

- Regulation of Adventure and Nature-Based Tourism statistics:

► **The action plan foresees to adopt a national system of Adventure and Nature-Based Tourism statistics, coupled with visitors' and residents' surveys, to be implemented with cooperation of Armenia universities.**

- Provision of legal amendments in the Code of Administrative Offences and inclusion of type of fine for the tour operator company for polluting or making damage of the specially protected area by members of the tour group.

► **Together with the private persons, the tour operators shall be responsible for keeping the nature in specially protected areas clean and safe.**

5.6. Investment policies and incentives

Besides helping to solve social issues, Adventure and Nature-Based Tourism can also works the other way round. As some locals learn new skills and advance their career in tourism, new motivations enter into the communities and stimulated more people to get involved not only in implementing direct niche tourism service but also other sub products. This is for instance the case of "*ancient Armenian shoe making*"[128] in Tatev village.

In the last years, earning independently from the state and from the pre-determined social status has become gradually more and more interesting for the youths in Armenia, with the growth of tourism flows being evident. Covid-19 lockdowns made it also more localized, due to growth of domestic tourism.

As successful stories of self-employed youths are now becoming real visible examples for many, building also on the experience of other international Adventure and Nature-Based Tourism destinations, the development of the niche might benefit from the provision of dedicated micro-grants aimed to stimulate particularly youths, women and residents' participation:

► **The action plan foresees the introduction of micro-grants mechanism for the Adventure and Nature-Based Tourism sector. The establishment of such micro-grants might be endorsed by the approval of a dedicated national law.**

To such extent, it is important to mention that in 2013 Armenia made paying taxes easier by merging the employee and employer social contributions and individual income tax into one unified income tax, although many firms are not aware of potentially available incentives in the tourism industry.

Nevertheless, locational and behavioral incentives may be one of the policy tools for Adventure and Nature-Based Tourism and for other niches as well, and they should be considered as part of a broader tourism development strategy. Prior WBG assessments suggest that Armenia currently lacks such a system for its incentives more broadly.[129]

[128] https://myarmenia.si.edu/en/guide/buy-local/artisan/trekh/

[129] Tourism Committee: Gaps in the Field of State Tourism Policy, 2018. Additionally, Business Armenia (BA) cites that: "Armenian Tax code provides several incentive schemes which can be applied to the investment projects in tourism sector, particularly: 1. Customs duty exemption on the importation of goods and materials, machinery for the investment project; and 2. VAT payment prolongation up to 3 years in case of importing necessary goods and machinery for the investment project." Additionally, BA cited accelerated depreciation being applied for hotel construction be considered an additional incentive.

5.7. Organization and management of the winter tourism niche

The implementation of the action plan relies on the collaboration of key stakeholders, which include, besides the Tourism Committee, the Ministry of Environment and a plethora of other actors.

Despite being a niche market segment, for all the positive economic and social impacts described above, Adventure Tourism should be given representation within the tourism institution, so that making it easier to invest in research on target adventure markets, adventure trends and products with potential, while sharing such information with the private sector so that encourage investments and public-private partnerships.

Examples of prioritization at national level include:

- Mexico, that invests heavily in tourism and also places a specific focus on adventure tourism;
- Bulgaria, where Three Ministries (Environment, Water, and Economy) came together to write the National EcoTourism Strategy and Action Plan. The plan included institutional development, marketing, and ecotourism business development;
- British Columbia, Canada, where the Adventure Tourism Policy issued by The British Colombia Ministry of Forests, Lands and Natural Resource Operations, regulates guided adventure tourism activities. It includes rules on concession use, crown land use, permits, and pricing[130].

► The action plan envisages that a **board of stakeholders is constituted at the national level**, particularly to contribute to the formulation of the Adventure and Nature-Based Tourism Strategy Plan and to monitor its subsequent implementation.

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 reduce 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 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", tourism 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, such as kayaking, rafting etc. Floods are also periodically registered in the major tourism destinations including Garni, Geghard, Jermuk. The snowstorms are another important phenomena influencing adventure tourism.

According to the above-mentioned National Communication, lack of data on tourism sector is a major barrier to assess the vulnerability of the winter tourism sector to climate change impacts.

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.

[130] British Colombia: www.for.gov.bc.ca/land_tenures/documents/policies/ adventure_tourism.pdf (24-09-2014).

7. TIME SCHEDULE

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 Adventure and Nature Based Tourism products	1.1 Formulate a comprehensive strategic plan for the development of Adventure and Nature-based Tourism in Armenia	1.1.1. Formulation of a complete Adventure and Nature Based Tourism Strategy Plan for Armenia with regard to specific sub-niches		•								
		1.1.2. Develop Transboundary tours involving long-distance hiking route			•							
	1.2 Upgrade tourism services and infrastructure at key Adventure and Nature Based Tourism sites and routes	1.2.1 Definition of a standard model of tourism services for Adventure and Nature Based Tourism		•								
		1.2.2 Implement tourism services by formulating actions plans for each Adventure and Nature-based travel sub-niche and key sites			•	■	■	■	■	■	■	■
	1.4 Increase capacity of Adventure and Nature-based tourism operators	1.3.1 Provide environmental education of local guides and other local service providers		•	■	■	■	■	■	■	■	■
		1.3.2 Provide trainings to the representatives of adventure and nature-based tourism fields			•	■	■	■	■	■	■	■
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		•	■	■	■	■	■	■	■	■
	2.2 Involve domestic tourists	2.2.1 Develop tour packages for domestic tourism				•	■	■	■	■	■	■
	2.3 Make Adventure and Nature-based tourism more accessible	2.3.1 Introduce soft-adventure programs for people with limitations in key tourism hotspot					•	■	■	■	■	■
		2.3.2 Increase on-line accessibility through VR / AR experiences					•	•	■	■	■	■
3. Promote positive impacts on host community and Armenian economy	3.1 Incentivate local micro-entrepreneurs	3.1.1 Introduce micro-grants mechanism for Adventure and Nature-base tourism operators			•	■	■	■	■	■	■	■
	3.2 Increase awareness about Adventure and Nature-based tourism	3.2.1 Implement awareness campaign at national and local level		•	■	■	■	■	■	■	■	■
4. 4. Update the institutional and legislative framework for Adventure and Nature Based Tourism development	4.1 Regulate Adventure and Nature-based professions and operators	4.1.1 Regulate Regulate adventure tourism professions		•								
		4.1.2 Regulate Regulate adventure tourism NGOs		•								
	4.2 Regulate access to Protected Areas	4.2.1 Create a functional well-organized payment system for entry to Pas			•							
		4.3.1 Implement visitor statistics at Adventure and Nature sites			•							
	4.3 Regulate the tourism statistics collection	4.3.2 Implement visitors and residents' satisfaction surveys				•						
5.1 Development of infrastructure for Adventure and Nature Based Tourism	5.1 Audit of the existing infrastructures and development of master plans	5.1.1 Audit of the existing infrastructures		•								
		5.1.2 Development of master plans for hard infrastructure refurbishment/upgrades			•	■	■					
	5.2 Implementation	5.2.1 Implementation of infrastructure improvement projects					•	■	■	■	■	■

Table 13: Adventure and Nature-Based Tourism Time Schedule

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

ANNEX 1 – List of most famous areas and destinations for adventure travelers

- Aragats Mountain
- Azhdahak Mountain
- The Geghama Mountain Range
- Lake Sevan and surroundings
- Tsakhkadzor with its ski resort and cable car
- Dilijan town and ”Dilijan” National Park
- “Khosrov Forest” State Reserve
- The Symphony of Stones with Basalt Organ Nature Monument
- Yell extreme park near Yenokavan
- Parz Lake and Gosh lake in Dilijan National Park
- Tatev Monastery with Wings of tatev Cable Car
- Devil’s Bridge by Tatev
- Khndzoresk old village
- Tumanyan town
- Vanadzor town
- Debet River and Canyon
- Stepanavan
- Hatis Mountain
- Aparan (Mountain range from Aparan to Dzoraglukh village)
- Buzhakan village (The mountain near the village)
- Vedi town (Near TV tower of “Red mountain”)[131]
- Noravank Monastery
- Hell’s Canyon
- Angels’ Canyon
- Vorotan Canyon
- “Shikahogh” State Reserve
- “Zangezur” Biosphere Complex
- Khustup Mountain
- Goris Cave Complex
- Arpa River Canyon
- Amberd Fortress
- Smbataberd
- Etc.

[131] https://paraglider.am/

ANNEX 2 – List of main adventure tourism infrastructures of Armenia

- Transcaucasian Trail
- Barev Trails
- Legends Trail
- Lori Trails
- Janapar Trail
- Yell Extreme Park
- Verev Park
- LORE Adventure Park
- Khndzoresk hanging bridge
- Boo Mountain Bike Park / Pumptrack
- Noravank Kanyon
- Bjni
- Etc.

ANNEX 3 – List of locations provided with ziplines

- Yell Extreme Park
- Tsakhkadzor
- Dilijan National park (Parz Lake)
- Kapan[132]
- Stepanavan
- Yerevan
- Shikahogh State Reserve
- Zipline Adventure Park
- Etc.

[132] https://armeniasputnik.am/20200815/ziplayn-pab-geter-u-katuner-inch-kareli-e-tesnel-kapanum-24121902.html

ANNEX 4 – List of Specially Protected Mature Areas [133]

- ""Khosrov Forest" State Reserve
- "Khor Virap" Sanctuary
- "Goravan Sands" Sanctuary
- "Shikahogh" State Sanctuary
- "Areviq" National Park
- "Boghaqar" Sanctuary
- "Plane Grove" Sanctuary
- "Zangezur" Sanctuary
- "Khustup" Sanctuary
- "Sev Lake " Sanctuary
- "Dilijan" National Park
- "Akhnabad Plane Grove" Sanctuary
- "Sevan" National Park
- "Juniper Woodlands" Sanctuary
- "Erebuni" State Reserve
- "Vordan Karmir" Sanctuary
- "Jermuk Hydrological" Sanctuary
- "Hankavan Hydrological" Sanctuary
- "Sojut" Arboretum
- "Idjevan" Arboretum
- "Vanadzor" Arboretum
- Berd "Soranner"
- "Jrvezh" Forest Park
- "Zikatar" Sanctuary
- "Lake Arpi" National Park

[133] http://www.mnp.am/en/environment/general-information

ANNEX 5 – Local tour operators focused on adventure tourism?

- **Culture Globe** https://www.tripadvisor.com/Attraction_Review-g293932-d13417703-Reviews-Culture_Globe-Yerevan.html
- **Paragliding in Armenia** https://www.tripadvisor.com/AttractionProductReview-g293932-d15342997-Paragliding_in_Armenia-Yerevan.html
- **Sky Club** https://www.tripadvisor.com/Attraction_Review-g293932-d10393236-Reviews-Sky_Club-Yerevan.html
- **Adventure Armenia** https://www.tripadvisor.com/Attraction_Review-g293932-d6781574-Reviews-Adventure_Armenia-Yerevan.html
- **Skyball** https://www.tripadvisor.com/Attraction_Review-g293932-d7757115-Reviews-Balloon_Ride_Skyball-Yerevan.html
- **Yerevan Zipline Airlines** https://www.tripadvisor.com/Attraction_Review-g293932-d13839004-Reviews-Yerevan_Zipline_Airlines-Yerevan.html
- **Wild Armenia** https://www.tripadvisor.com/Attraction_Review-g293932-d13748646-Reviews-Wild_Armenia-Yerevan.html
- **Apaga Resort** https://www.tripadvisor.com/Hotel_Review-g4414707-d6528504-Reviews-Apaga_Resort-Yenokavan_Tavush_Province.html
- **Arara Tour** https://www.tripadvisor.com/Attraction_Review-g293932-d12850991-Reviews-Arara_Tour-Yerevan.html
- **Tripsters Armenia** https://www.tripadvisor.com/Attraction_Review-g293932-d17555322-Reviews-Tripsters_Armenia-Yerevan.html
- **Armenian Adventures** https://www.tripadvisor.com/Attraction_Review-g293932-d15360866-Reviews-Armenian_Adventures-Yerevan.html
- **Gardman Tour Armenia** https://www.tripadvisor.com/Attraction_Review-g293932-d10004772-Reviews-Gardman_Tour_Armenia-Yerevan.html
- **Grand Hotel Yerevan** https://www.tripadvisor.com/Hotel_Review-g293932-d585269-Reviews-Grand_Hotel_Yerevan-Yerevan.html
- **Hyur Service** https://www.tripadvisor.com/Attraction_Review-g293932-d10172614-Reviews-Hyur_Service-Yerevan.html
- **CityQuester** https://www.tripadvisor.com/Attraction_Review-g293932-d15355032-Reviews-CityQuester-Yerevan.html
- **Yell Extreme Park** https://www.tripadvisor.com/Attraction_Review-g4414707-d8517704-Reviews-Yell_Extreme_Park-Yenokavan_Tavush_Province.html
- **Hayk The Guide** https://www.tripadvisor.com/Attraction_Review-g293932-d13456238-Reviews-Hayk_The_Guide-Yerevan.html
- **Armland Adventure Club** https://www.tripadvisor.com/Attraction_Review-g293932-d16674397-Reviews-Armland_Adventure_Club-Yerevan.html
- **Gira Travel** https://www.tripadvisor.com/Attraction_Review-g293932-d15224585-Reviews-Gira_Travel-Yerevan.html
- **Yerevan Free Walking Tour** https://www.tripadvisor.com/Attraction_Review-g293932-d11491964-Reviews-Yerevan_Free_Walking_Tour-Yerevan.html
- **Armenia Guide Tours & Travel** https://www.tripadvisor.com/Attraction_Review-g293932-d15660826-Reviews-Armenia_Guide_Tours_Travel-Yerevan.html
- **Juva Tours** https://www.tripadvisor.com/Attraction_Review-g293932-d10406954-Reviews-Juva_Tours-Yerevan.html
- **One Way Tour** https://www.tripadvisor.com/Attraction_Review-g293932-d9771535-Reviews-ONE_WAY_TOUR-Yerevan.html
- **Hey Armenia Travel Company** https://www.tripadvisor.com/Attraction_Review-g293932-d17660041-Reviews-Hey_Armenia_Travel_Company-Yerevan.html
- **Advantour** https://www.tripadvisor.com/Attraction_Review-g294195-d8804311-Reviews-Advantour-Tbilisi.html
- **Armenian Geographic** https://www.tripadvisor.com/Attraction_Review-g293932-d12396787-Reviews-Armenian_Geographic-Yerevan.html
- **Armenian Trip** https://www.tripadvisor.com/Attraction_Review-g293932-d21242835-Reviews-Armenian_Trip-Yerevan.html
- **GT Armenian Tours** https://www.tripadvisor.com/Attraction_Review-g293932-d15812983-Reviews-GT_Armenian_Tours-Yerevan.html

- **Armenian Helicopters** https://www.tripadvisor.com/Attraction_Review-g293932-d15791853-Reviews-Armenian_Helicopters-Yerevan.html
- **Armenian Outdoor Adventures** https://www.tripadvisor.com/Attraction_Review-g293932-d15758501-Reviews-Armenian_Outdoor_Adventures-Yerevan.html
- **Aero Club - Armenian Paragliding Club** https://www.tripadvisor.com/Attraction_Review-g293932-d19242421-Reviews-Aero_Club_Armenian_Paragliding_Club-Yerevan.html
- **Lori Adventure Tourism Association (LATA)** https://www.facebook.com/groups/adventure.armenia/
- **North Adventures Armenia** https://www.facebook.com/NorthAdventuresArmenia
- **Adventure Armenia / Sport & Adventure Tourism Festival** / Ադրվածայինհայաստան https://www.facebook.com/profile.php?id=100063541539724

ANNEX 6 – Key adventure travel stakeholders (other than Government)

- Armenian Adventure Tourism Association
- Caucasus nature fund
- HikeArmenia
- Transcaucasian Trail
- Armenian Tourism Community
- Armenian Cycling federation
- Federation of Cyclists, Amateur Cycling and Sport Tourism of Armenia
- Velo Club biking club and repair shop
- Your Bike biking club and repair shop
- Ministry of Nature Protection
- WWF Armenia
- Ecotourism Association of Armenia
- Bari Galoust – Armenian B&B Association
- Regional Development Foundation
- Federation of Amateur Cycling and Cycle Tourism
- Armenian Hikers Association
- Union of Incoming Tour Operators
- Development Foundation of Armenia
- Armenian Adventure Travel Association
- Young Biologists Association
- Armenian Geographic
- Tourism Armenia
- Armenian Travel Directory
- IDeA Foundation
- Armenia Territorial Development Fund (ATDF)
- EV Consulting
- Ministry of Territorial Administration and Development
- Gardman Tour Travel Operator
- Ecotour
- Eli.am
- Green Way Travel Armenia
- AUA Turpanjian Rural Development Program (TRDP)
- Eurasia Partnership Foundation Armenia
- Hovnanian Foundation
- RA Ministry of Agriculture
- Jermuk Development Center NGO
- Lori Adventure Travel Association
- Hikers.am
- ARK Ecological NGO
- Youth cooperation center of Dilijan NGO
- Armenian Guides Guild
- KASA Fondation Humanitaire Suisse
- Foundation for the Preservation of Wildlife and Cultural Assets (FPWC)
- Armenian Society for the Protection of Birds (ASPB)
- UNDP in Armenia
- Regional Research Institute for Social and Economic Policy (RRISEP)
- Armenian Young Women's Association
- Heifer Armenia
- Areni Fest Foundation
- Sun Child International Environmental Festival
- Yerevan Half Marathon
- Federation of Amateur Cycling and Cycle Tourism
- Boo Mountain Bike park
- Armenia Tree Project
- Paragliding in Armenia – SKY CLUB

- Up the Rocks

ANNEX 7 – Detail of actions

1. Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products

1.1 Formulate a comprehensive strategic plan for the development of Adventure and Nature-based Tourism in Armenia

1.1.1 Formulation of a complete Adventure and Nature-Based Tourism Strategy Plan for Armenia with regard to specific sub-niches

Action	1.1.1 Formulate of a complete Adventure and Nature-Based Tourism Strategy including specific sub-niches
Strategic objective	1. Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products
Specific objective	1.1 Formulate of a complete Adventure and Nature-Based Tourism Strategy including specific sub-niches
Description	Formulation of a complete Adventure and Nature-Based Tourism Strategy Plan for Armenia
Key activities	• Research on the best practices of Adventure and Nature-Based Tourism worldwide • Research on the best examples of Adventure and Nature-Based Tourism practices in Armenia, choose the main directions and examples as showcases • Organize meetings with the local stakeholders both in the capital and on the sites where they operate, in order to gather the maximum information on what's there in reality, and what's the main features and quality of tourism products / services they offer • Create a board of stakeholders • Involve representatives of a number of State bodies / institutions, experts, professionals in the board in order to guarantee a multidisciplinary and highly professional collaboration • Define the main directions of development and assign tasks among stakeholders • Formulation of the strategy plan by collecting proposal of different sub-niches including new tours • Prioritization of intervention by using proper methodologies, such as Multi-criteria decision analysis coupled with Decision Conference
Key Performance Indicators	Adventure and Nature-Based Tourism Strategy Plan for Armenia approved by the TC
Subject responsible	Tourism Committee
Key stakeholders involved	• Ministry of Education, Science, Culture and Sport • Ministry of Environments • National Academy of Sciences • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • Bryusov State University • Ministry of Emergency Situations • Other relevant State Bodies / Institutions • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Armenian Church Local government bodies • Adventure Tourism Clubs and Groups (both formal and non-formal) • Student Unions at Universities • General population of Armenia
Source of funding	Both public and private sectors
Time frame	Year 2

Recommendations	• Take care of possible funding for creation of a sustainable and independent stakeholder board which will be able to function effectively (possibly with a separate office in the capital or a shared office space in a co-working venue such as Impact Hub for example). This can ensure that the meetings are held regularly and the gathered information and ideas are well-preserved / developed by professionals, so that the process will not last too long and the strategies will be ready within the suggested logical timeframe.
	• It is important to guarantee the continuous innovation of the Adventure and Nature-Based Tourism by:
	  ○ Developing alternative tourism activities, including country specific adventure tourism variations:
	  ○ Involve existing festivals in the development of new products;
	  ○ Create new festivals base on the Adventure and Nature-Based Tourism concept.
	• The strategy should be built on sound governance methods. It is therefore advised:

- To develop a board of stakeholders to coordinate the Adventure and Nature-Based Tourism activities;
- To create a platform for stakeholder communication;
- To involve historians, ethnographers and other specialists in research and exploration of new possible uses of Armenian intangible heritage in the creation of Adventure and Nature-Based Tourism tour products

- Consider new experiences such as:
  - New educational and outdoor adventure quest games about wilderness, to attract younger generation and whoever interested in learning while traveling / on holidays
  - Wildlife photography tours
  - Birdwatching tours

1.1.2 Create a Joint All-Armenia Transboundary Tourism Product Package

Action	1.1.2 Develop Transboundary tours involving long-distance hiking route
Strategic objective	1. Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products
Specific objective	1.1 Formulate a comprehensive strategic plan for the development of Adventure and Nature-Based Tourism in Armenia
Description	Creation and implementation of a Joint All-Armenia Transboundary Tourism Product Package

Key activities	• Explore the latest developments of the following routes and projects:
	  ○ The Transcaucasian Trail
	  ○ Janapar Trail
	  ○ Lake Arpi National Park Transboundary Trails
	  ○ Armenia-Georgia Cross-border Tourism Product "From Mountains to the Villages"
	  ○ Armenian Highland Trail
	• Organize stakeholder meetings and engage all representatives of the projects listed above, to consult possible joint products, to explore the perspectives for collaboration and development of new products
	• Organize meetings with relevant State Bodies / Institutions to discuss possible challenges related to border-crossing, regional conflicts affecting the joint products in practical ways etc.
	• Consult possibilities for State funding for especially the most effective initiatives which are in continuous need for maintenance of the routes and other infrastructures in order to stay up and running
	• Finalize the National Document on Trail Signage Standards (if needed) or just get it signed by the Prime Minister in the way it is agreed upon at the moment
	• Draft and develop a General Master Plan of Armenia's Transboundary Routes
	• Create new routes and maintain existing routes every year
	• Collaborate with the Adventure and Nature-Based Tourism Board in all the matters related to tour package development, collaborate in all possible ways

Key Performance Indicators	• Joint All-Armenia Transboundary Tourism Product Package is created • At least 200 kms of routes are maintained every year • At least 50 kms of new routes are created every year • The National Document on Trail Signage Standards is signed by the Prime Minister and is put in full action with full capacity for law enforcement • General Master Plan of Armenia's Transboundary Routes is drafted and in continuous development • Meetings are held with Adventure and Nature-Based Tourism Board on regular basis • Armenia received at least 3-5000 new through-hikers every year
Subject responsible	Tourism Committee, Transcaucasian Trail NGO / Armenia, Hike Armenia NGO
Key stakeholders involved	• The Transcaucasian Trail • Janapar Trail • Lake Arpi National park Transboundary Trails • Armenia-Georgia Cross-border Tourism Product "From Mountains To The Villages" • Armenian Highland Trail • Ministry of Education, Science, Culture and Sport • Ministry of Environments • National Academy of Sciences • Caucasus Nature Fund • WWF Armenia • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • Bryusov State University • Ministry of Emergency Situations • Other relevant State Bodies / Institutions • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Armenian Church Local government bodies • Adventure Tourism Clubs and Groups (both formal and non-formal) • Student Unions at Universities • General population of Armenia • SPNAs of Armenia[134]
Source of funding	Public and private, as well as International and local grant projects and FDI funding
Time frame	Year 3

[134] Specially Protected Nature Areas

Recommendations	Use the experience and expertise of the Transcaucasian Trail, Hike Armenia NGO, and Trails For Change NGO as the main actors for transboundary tour development in Armenia, in order to save time and resources in development of transboundary infrastructures and products. Focus on the experience of TCT in promotion and marketing of the transboundary tourism products, explore possible links between the voluntourism (already practiced by the TCT) and commercial tourism products (also already tried out by the TCT) in order to develop new products.

1.2 Upgrade tourism services and infrastructure at key Adventure and Nature-Based Tourism sites and routes

1.2.1 Definition of a standard model of tourism services for Adventure and Nature-Based Tourism

Action	1.2.1 Adopt a standard model of tourism services for Adventure and Nature-Based Tourism
Strategic objective	1. Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products
Specific objective	1.3 Upgrade tourism services and infrastructure at key Adventure and Nature-Based Tourism sites and routes
Description	Formulation of minimum quality service standards for Adventure and Nature-Based Tourism sites and routes The action includes: • Organization of consultations about the types, quality and development directions of the existing services with the key players of the Adventure and Nature-Based Tourism in Armenia • Taking care of a continuous step-by-step action for adopting the standard model of tourism services, addressing the relevant State bodies and all other stakeholders which can play a role in the process
Key activities	• Benchmark the best international experiences of minimum quality service standards for Adventure and Nature-Based Tourism sites and routes • Assess key Armenia locations to understand the main service standards which are needed • Do surveys among tourists to understand which quality service standards they expect • Do surveys among TOs[135] to understand also from their point of view what quality service standards do their tourists expect (based on the experiences of the TOs) • Identify KPIs for quality service standards • Create legislative basis for minimum standards of service quality in Adventure and Nature-Based Tourism sites and routes (including parking area, toilets for tourists, mobility infrastructures for the tourists with limited mobility of other issues requiring a special approach, etc.)
Key Performance Indicators	Approval of legislative framework about minimum standards of service quality in Adventure and Nature-Based Tourism sites in 3 years
Subject responsible	Tourism committee
Key stakeholders involved	• The Transcaucasian Trail • Janapar Trail • Armenian Adventure Travel Association • SPNAs of Armenia[136] • Caucasus Nature Fund • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • Ministry of Economy • Ministry of Environment • Ministry of Emergency Situations • Ministry of Finance • Ministry of Health • Ministry of Labor and Social Affairs • Ministry of Territorial Administration and Infrastructure • Environmental Protection and Mining Inspection Body of the Republic of Armenia • Food Safety Inspectorate • Market Surveillance Inspection Body • State Revenue Committee • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • State supervision service of the Republic of Armenia • Intergovernmental Commission on Economic Cooperation between the Republic of Armenia and Georgia • U.S. - Armenia Intergovernmental Commission • Armenian-German intergovernmental commission on financial and technical cooperation • Armenian-Austrian joint commission on trade-economic and scientific-technical cooperation

[135] This is important due to the fact that collection of data from tourists in Armenia is currently not yet structured to the level which can allow scientific data analysis
[136] Specially Protected Nature Areas

	• Armenian-Czech intergovernmental commission on economic cooperation • Other relevant State Bodies / Institutions • Standing Committee on Economic Affairs[137] • Standing Committee on European Integration • Standing Committee on Labor and Social Affairs • Standing Committee on State and Legal Affairs • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Adventure Tourism Clubs and Groups (both formal and non-formal) • General population of Armenia
Source of funding	Public sector
Time frame	Year 2

Recommendations	• To be done according to international best practices, using the best local expertise and working closely with as many State related bodies, institutions, committees, as possible, in order to guarantee not only the careful research on the gaps in this field but also the timely adoption of the standards on service quality, as well as the further monitoring of their implementation throughout the country.
	• Consider new experiences such as:
	  ○ New educational and outdoor adventure quest games about wilderness, to attract younger generation and whoever interested in learning while traveling / on holidays
	  ○ Wildlife photography tours
	  ○ Birdwatching tours

[137] This and other "Standing Committees are part of the Armenian Parliament http://www.parliament.am/committees.php?lang=eng

1.2.2 *Implement tourism services by formulating actions plans for each Adventure and Nature-Based travel sub-niche*

Action	1.2.2 Implement tourism services by formulating actions plans for each Adventure and Nature-Based Tourism sites and routes
Strategic objective	1. 1. Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products
Specific objective	1.3 Increase quality levels at Adventure and Nature-Based Tourism sites
Description	Implementation of tourism services standard by formulating actions plans for each Adventure and Nature-Based Tourism sub-niche and key sites The action consists in: • Bringing the overall quality of services of Adventure and Nature-Based Tourism in Armenia to a whole new level, addressing each of Soft and Hard adventure types and their sub-types • Increase quality levels at Adventure and Nature-Based Tourism, historical-cultural, natural, and other sites • Increase the quality levels of various services being offered at the mentioned sites • Differentiating tourism products including new tours and adventures

Key activities	• Prioritize Adventure and Nature-Based Tourism sites and routes for implementation of approved quality service standards by considering also new experiences:
	  ○ New educational and outdoor adventure quest games about wilderness, to attract younger generation and whoever interested in learning while traveling / on holidays
	  ○ Wildlife photography tours
	  ○ Birdwatching tours
	• Work closely with both TOs and LSPs, discussing the new approaches and helping them to overcome any possible challenges they might be facing along the implementation of the new approaches
	• Organize continuous route-testing by the local (and also sometimes international) Adventure and Nature-Based Tourism professionals in order to prevent any risks in their further exploitation, as well as for collecting the necessary information for including in the product descriptions
	• Implement quality service standards through tourism development plans at each key site
	• Monitor the quality service standards at each key site

Key Performance Indicators	Quality service standards defined and implemented through tourism development plans for each key site in 3-10 years period
Subject responsible	Tourism Committee
Key stakeholders involved	• Tour Operators involved in Adventure and Nature-Based Tourism • Adventure Tourism Clubs and Groups (both formal and non-formal) • Armenian Adventure Travel Association • The Transcaucasian Trail • Trails For Change NGO • Janapar Trail • SPNAs of Armenia[138] • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • Ministry of Economy • Ministry of Environment • Ministry of Emergency Situations • Ministry of Health • Ministry of Labor and Social Affairs • Ministry of Territorial Administration and Infrastructure • Environmental Protection and Mining Inspection Body of the Republic of Armenia • Food Safety Inspectorate • Market Surveillance Inspection Body • State Revenue Committee • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • State supervision service of the Republic of Armenia • Other relevant State Bodies / Institutions • Standing Committee on Economic Affairs[139] • Standing Committee on Labor and Social Affairs • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia

[138] Specially Protected Nature Areas
[139] This and other "Standing Committees are part of the Armenian Parliament http://www.parliament.am/committees.php?lang=eng

	• General population of Armenia
Source of funding	Public sector
Time frame	Since year 3
Recommendations	To be done according to international best practices with consideration of ongoing continuous efforts by an organized team, perhaps under the Adventure and Nature-Based Tourism Board (ANBTB) mentioned in this document, as an integral functioning body for main activities as well as task division among stakeholders. As mentioned in the Action 1.1.1, it would work better if some public funding might help to provide an office space and set roles within the main team. Since this stage already requires more work on the sites, it would also be great to set up branches of the ANBTB in the regions (1 in each region of Armenia) to work with the central office in the capital.

1.3 Increase capacity of Adventure and Nature-Based Tourism operators

1.3.1 Provide environmental education of local guides and other local service providers

Action	1.4.1 Provide environmental education of local guides and other local service providers
Strategic objective	1. Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products
Specific objective	1.4 Increase capacity of Adventure and Nature-Based Tourism operators
Description	Identification and implementation of capacity building for private operators in Adventure and Nature-Based Tourism management by: • Using alternative education / adult education methods and best international practices combined with innovation, adapting and using them effectively in educational / training activities for LGs and other TSPs, especially those living / working / operating in the regions • Involving the SPNAs in the process as much as possible, which can also help them to advance their nature protection activities as an added value

Key activities	• Bring up the environmental education needs at the board ANBTB meetings, get the feedback of the board
	• Bring up the environmental education needs at the meetings with SPNAs, get their feedback too
	• Decide the main educational directions based on the existing educational / training needs of the LGs and other TSPs, discussed at the meetings with stakeholders
	• Collaborate with the SPNAs on development of the curriculums
	• Create universal adapted training modules with both short-term and long-term goals, discuss them with the relevant State and public bodies, as well as international organizations (including local branches of funds which provide educational funding)
	• Explore the project “Armenia’s Environmental Challenges and Opportunities. Environmental Education Training Modules and Training of Trainers”[140]
	• Check the following list for main directions of trainings:
	  ○ IT and Environment
	  ○ Water
	  ○ Waste to Value: Towards Circularity
	  ○ Responsible Mining
	  ○ Participatory Environmental Governance
	  ○ Sustainable Energy
	  ○ Biodiversity and Forests
	  ○ Sustainable Cities
	  ○ Disaster Resilience
	  ○ Environmental Education
	  ○ Ecotourism
	• Organize short-term and long-term training cycles for the LGs and other TSPs
	• Explore the initiative “My Forest Armenia” for training sessions[141]
	• Explore the initiative “Study in Armenia” for their “Earth Studies” and other educational projects[142]
	• Monitor the educational training activities

Key Performance Indicators	• Increase of capacity of LGs, other TSPs, private operators in Adventure and Nature-Based Tourism • Results visible and developments managed by the ATNBTB, under supervision of the Tourism Committee
Subject responsible	Tourism committee
Key stakeholders involved	• Tour Operators involved in Adventure and Nature-Based Tourism • Adventure Tourism Clubs and Groups (both formal and non-formal) • Armenian Adventure Travel Association • Armenian Tourism Institute • Young Biologists Association[143] • Bryusov State University / Tourism Department • Yerevan State University / Tourism Department • Erasmus Plus Armenia office [144] • AUA / Acopian Center for the Environment[145]

[140] https://ace.aua.am/resources/armenias-environmental-challenges-and-opportunities-environmental-education-training-modules-and-training-of-trainers/
[141] https://myforestarmenia.org/environmental-education/#
[142] https://studyinarmenia.org/en/programs/environmental-studies-earth-sciences-degrees/
[143] http://www.yba.am/
[144] https://erasmusplus.am/
[145] https://ace.aua.am/ https://www.acopiancenter.am/page.asp?tid=77

	• My Forest Armenia[146] • Study in Armenia[147] • Business Support Center • The Transcaucasian Trail • Trails For Change NGO • Janapar Trail • SPNAs of Armenia[148] • Armenian Hiking and Mountaineering Federation • Armenian Ecotourism Association[149] • Armenian Institute of Physical Culture • Ministry of Education, Science, Culture and Sport • Ministry of Economy • Ministry of Environment • Ministry of Emergency Situations • Ministry of Health • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • Other relevant State Bodies / Institutions • Education Inspectorate • Urban Development, Technical Standards and Fire Safety Inspectorate • Armenian Apostolic Church • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	• Trainings should be done based on international best practice, using the best local expertise from both public and private sectors, including the EU's Erasmus Plus project, which has educational component and supports alternative / adult education. • The TC should decide the main program with help of the experts involved. The short-term and long-term trainings should be based on educational priorities, as well as regional circumstances and additional training needs based on each venue where the trainees come from / work in. • Smooth collaboration between experts / educators with local and international backgrounds and different educational methods should be guaranteed, and the main focus should be on maximum efficiency of the training activities.

[146] https://myforestarmenia.org/
[147] https://studyinarmenia.org/
[148] Specially Protected Nature Areas
[149] http://www.ecotourismarmenia.com/pages/about.htm

1.3.2 Organize cycles of trainings for the representatives of Adventure and Nature-Based Tourism fields

Action	1.3.2 Provide trainings to the representatives of Adventure and Nature-Based Tourism
Strategic objective	1. Creation of a competitive and sustainable portfolio of Adventure and Nature-Based Tourism products
Specific objective	1.3 Increase capacity of Adventure and Nature-Based Tourism operators
Description	Organization of cycles of trainings for the representatives of Adventure and Nature-Based Tourism fields by: • Using alternative education / adult education methods and best international practices combined with innovation, adapting and using them effectively in educational / training activities for tourism operators and other representatives of Adventure and Nature-Based Tourism field, especially those living / working / operating in the regions • Involve the SPNAs in the process as much as possible, which can also help them to advance their nature protection activities as an added value
Key activities	• Bring up the environmental education needs at the board ANBTB meetings, get the feedback of the board • Bring up the environmental education needs at the meetings with SPNAs, get their feedback too • Decide the main educational directions based on the existing educational / training needs of the TOs and other representatives of Adventure and Nature-Based Tourism, discussed at the meetings with stakeholders • Collaborate with the SPNAs on development of the curriculums • Create universal adapted training modules with both short-term and long-term goals, discuss them with the relevant State and public bodies, as well as international organizations (including local branches of funds which provide educational funding) • Explore the project “Armenia’s Environmental Challenges and Opportunities. Environmental Education Training Modules and Training of Trainers” [150] • Check the following list for main directions of trainings: - IT and Environment - Water - Waste to Value: Towards Circularity - Responsible Mining - Participatory Environmental Governance - Sustainable Energy - Biodiversity and Forests - Sustainable Cities - Disaster Resilience - Environmental Education - Ecotourism • Organize short-term and long-term training cycles for the TOs and other representatives of Adventure and Nature-Based Tourism • Explore the initiative “My Forest Armenia” for training sessions • Explore the initiative “Study in Armenia” for their “Earth Studies” and other educational projects Monitor the educational training activities
Key Performance Indicators	• Increased capacity of TOs and other representatives of Adventure and Nature-Based Tourism • Results are visible with developments managed by the ATNBTB, under supervision of the Tourism Committee
Subject responsible	Tourism committee
Key stakeholders involved	• Tour Operators involved in Adventure and Nature-Based Tourism • Adventure Tourism Clubs and Groups (both formal and non-formal) • Armenian Adventure Travel Association • Armenian Tourism Institute • Young Biologists Association • Bryusov State University / Tourism Department • Yerevan State University / Tourism Department • Erasmus Plus Armenia office • AUA / Acopian Center for the Environment • My Forest Armenia • Study in Armenia • Business Support Center • The Transcaucasian Trail • Trails For Change NGO • Janapar Trail

[150] https://ace.aua.am/resources/armenias-environmental-challenges-and-opportunities-environmental-education-training-modules-and-training-of-trainers/

	• SPNAs of Armenia • Armenian Hiking and Mountaineering Federation • Armenian Ecotourism Association • Armenian Institute of Physical Culture • Ministry of Education, Science, Culture and Sport • Ministry of Economy • Ministry of Environment • Ministry of Emergency Situations • Ministry of Health • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • Other relevant State Bodies / Institutions • Education Inspectorate • Urban Development, Technical Standards and Fire Safety Inspectorate • Armenian Apostolic Church • Educational Institutions which have departments of Tourism and related subjects Private sector / Local TSPs from the regions of Armenia
Source of funding	Public and private sector
Time frame	Since year 3
Recommendations	The cycle of workshops should include cross-cultural learning / competencies, which can either be incorporated into other trainings (for local guides and other tourism service providers) or organized as separate training cycles in the frame of various projects to support tourism development (for example the trainings organized by Tourism Innovation Academy[151]).

[151] https://yerevan.impacthub.net/tourism-innovation-academy/

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 promoting the Armenia Adventure and Nature-Based Tourism product in international markets, while presenting the unique resources of the country.
Key activities	• Formulation of yearly Adventure and Nature-Based Tourism web marketing plan • Exploration of the already drafted Adventure Tourism Portal initiative (now idle)[152] by some local Adventure and Nature-Based Tourism specialists for possibilities of collaboration • Exploration of the currently working ArmAdventure.com[153] initiative (different than the one ending with .org) • Implementation of the web marketing plan by for instance: o Create a dedicated section in the official tourist website of RA *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: Adventure and Nature-Based Tourism, with its subsections.* o Have a separate section on key sites and routes o Implement Influencer marketing, Word of mouth marketing, viral marketing and SMM. o Invite international B-loggers and V-loggers
Key Performance Indicators	• No. of separate page for Adventure and Nature-Based Tourism on the main touristic portal • No. of virtual visits on the separate section • No. of followers of social media
Subject responsible	Tourism committee
Key stakeholders involved	• Tour Operators involved in Adventure and Nature-Based Tourism • Adventure Tourism Clubs and Groups (both formal and non-formal) • Armenian Adventure Travel Association • Armenia Travel (the team behind the “Armenia.Travel” [154] social media accounts on Facebook and Instagram) • Top Marketing Agencies in Armenia[155] • Armenian Marketing Association[156] • ICE Trade (Internet Centre of Electronic Trade) • National Center for Marketing • Young Biologists Association • Bryusov State University / Tourism Department • Yerevan State University / Tourism Department • The Transcaucasian Trail • Trails For Change NGO • SPNAs of Armenia • Ministry of High-Tech Industry • Ministry of Education, Science, Culture and Sport • Other relevant State Bodies / Institutions • Private sector / Local TSPs from the regions of Armenia
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.

[152] http://armadventure.org/ initiated in 2017 by Armenian Adventure Travel Association, but currently in unknown state
[153] https://armadventure.com/contact/
[154] www.facebook.com/ArmeniaTravelOfficial
[155] https://agencyvista.com/lists/top-marketing-agencies-in-armenia/ https://www.sortlist.com/l/armenia-am
[156] https://armenianmarketing.com/en/ https://www.sortlist.com/l/armenia-am

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	• Formulation of yearly Adventure and Nature-Based Tourism trade and press marketing plan
	• Implementation of the yearly Adventure and Nature-Based Tourism trade and press marketing plan by for instance:
	  ○ Organize fam-trips and press tours to Adventure and Nature-Based Tourism sites targeting key international markets
	  ○ Couple fam trips ad press tours with roadshow at origin markets
	  ○ Present the Adventure and Nature-Based Tourism product in international exhibitions

Key Performance Indicators	• Each year 2 fam-trips and press tours organized to main Adventure and Nature-Based Tourism sites • Each year 2 roadshow organized in origin countries
Subject responsible	• Tourism committee • Private sector
Key stakeholders involved	• Tour Operators involved in Adventure and Nature-Based Tourism • Adventure Tourism Clubs and Groups (both formal and non-formal) • Armenian Adventure Travel Association • Armenia Travel (the team behind the “Armenia. Travel” [157]social media accounts on Facebook and Instagram) • Top Marketing Agencies in Armenia[158] • Armenian Marketing Association[159] • Armenian Trade Network[160] • Armenian Business Coalition[161] • Top Armenian Business Organizations[162] • National Center for Marketing • Young Biologists Association • Bryusov State University / Tourism Department • Yerevan State University / Tourism Department • The Transcaucasian Trail • Trails For Change NGO • SPNAs of Armenia • Ministry of Economy • Ministry of High-Tech Industry • Ministry of Finance • Intergovernmental Commissions related to international relations and trade[163] • Other relevant State Bodies / Institutions • The Union of Manufacturers and Businessmen of Armenia • Armenian business club Cilicia • Mantashyants Entrepreneurs Union • Private sector / Local TSPs from the regions of Armenia
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	• The trade and press marketing should be used widely towards main target market • A strategy of mixed trade and consumer marketing could be used • Involving private operators in the organization of trade and press marketing would be useful, so as to obtain free accommodation services and transfers

[157] www.facebook.com/ArmeniaTravelOfficial
[158] https://agencyvista.com/lists/top-marketing-agencies-in-armenia/ https://www.sortlist.com/l/armenia-am
[159] https://armenianmarketing.com/en/ https://www.sortlist.com/l/armenia-am
[160] http://www.armeniantradenetwork.com/
[161] http://abcoalition.am/hy/
[162] https://insurebusiness.am/%D5%B0%D5%A1%D5%B5%D5%A1%D5%BD%D5%BF%D5%A1%D5%B6%D5%AB-10-%D5%A2%D5%AB%D5%A6%D5%B6%D5%A5%D5%BD-%D5%A1%D5%BD%D5%BD%D5%B8%D6%81%D5%AB%D5%A1%D6%81%D5%AB%D5%A1%D5%B6%D5%A5%D6%80%D5%A8/?lang=en
[163] https://www.gov.am/en/committees/

2.2 Involve domestic tourism

2.2.1 Develop tour packages for domestic tourism

Action	2.1.2 Develop tour packages for domestic tourism
Strategic objective	2 Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.2 Involve domestic tourists
Description	Formulation and implementation of tour packages for domestic tourism by • Involving international partners in tour package development • Creating final functional packages
Key activities	• Explore the perspectives of development of domestic Adventure and Nature-Based Tourism • Create domestic Adventure and Nature-Based Tourism packages in collaboration with local and international partner TOs, and other representatives of the field • Test existing domestic tourism products together with the stakeholders representing various fields • Organize meetings initiated by the ANBTB in Yerevan and regions of Armenia, possibly in representations of the ANBTB (as recommended in previous actions) • Work closely with the Public and Private organizations on the validation of already tested tour packages, before the main launch • Collect feedback from clients and partners on tested products • Update the Adventure and Nature-Based Tourism web-resource (maybe a portal, as assumed in the previous actions) with all the tested and validated products
Key Performance Indicators	• Yearly growth of domestic tours • Each year 5 fam-trips and press tours are organized to main Adventure and Nature-Based Tourism sites • Each year 5 roadshows are organized
Subject responsible	Tourism committee
Key stakeholders involved	• The Transcaucasian Trail • Janapar Trail • Lake Arpi National Park Transboundary Trails • Armenia-Georgia Cross-border Tourism Product “From Mountains to The Villages” • Armenian Highland Trail • Armenian Adventure Travel Association • Ministry of Education, Science, Culture and Sport • Ministry of Environments • National Academy of Sciences • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • Bryusov State University • Ministry of Emergency Situations • Other relevant State Bodies / Institutions • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Armenian Apostolic Church • Local government bodies • Adventure Tourism Clubs and Groups (both formal and non-formal) • Student Unions at Universities • SPNAs of Armenia[164]
Source of funding	Public and private sector
Time frame	Since year 4
Recommendations	• Explore the existing domestic products • Explore World’s best practices of domestic tourism in the fields of Adventure and Nature-Based Tourism, filter the best fitting ones for local adaptation • Focus on organizing funding for fam-trips for domestic tour packages, to organize them frequently, as one of the best ways to develop synergy and cooperation • Perhaps it would be useful to differentiate between domestic and incoming tourism activities organized and implemented by the ANBTB

[164] Specially Protected Nature Areas

2.3 Make Adventure and Nature-Based Tourism more accessible

2.3.1 Introduce soft-adventure programs for people with limitations in key tourism hotspot

Action	2.2.1 Introduce soft-adventure programs for people with limitations in key tourism hotspot
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.1 Make Adventure and Nature-Based Tourism more accessible
Description	Formulation and commercialization of soft-adventure programs for people with special needs in key tourism hotspot
Key activities	• 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 "Adventure and Nature-Based Tourism Accessible Armenia Tourism Plan" including key sites and routes • Prioritize interventions • Formulate key detailed actions at chosen destination/routes to make the sites/routes accessible • Implement the actions to enhance the accessibility of Adventure and Nature-Based Tourism, as well as cultural sites for people with physical disabilities
Key Performance Indicators	• Three Adventure and Nature-Based Tourism sites becoming accessible for all people each year after the 3rd year
Subject responsible	Tourism Committee
Key stakeholders involved	• The Transcaucasian Trail • Armenian Adventure Travel Association • Ministry of Health • Ministry of Education, Science, Culture and Sport • Ministry of Environments • Ministry of Justice • Health and labor Inspection body of the Republic of Armenia • Market Surveillance Inspection Body • Urban Development Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • State supervision service of the Republic of Armenia • National Academy of Sciences • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • Bryusov State University • Ministry of Emergency Situations • Other relevant State Bodies / Institutions • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Armenian Apostolic Church • Local government bodies • Adventure Tourism Clubs and Groups (both formal and non-formal) • Student Unions at Universities • SPNAs of Armenia Armenian Camp NGO • Warm Hearth NGO (Jermik Ankyun) • Disability and Inclusive Development" NGO • Disability Rights Agenda • PYUNIC Armenian Association for The Disabled • Unison NGO – The Paros Foundation • Global Disability Rights Now! Armenia • Disability:IN • Salvation NGO • Bridge of Hope • Other NGOs, Foundations and Associations for the People with special needs, and other State bodies
Source of funding	Public and private sector
Time frame	Since year 5
Recommendations	• The action should be implemented at first taking into account the most visited and demanded sites by tourists • The projects which have already worked on creating accessibility infrastructures in Armenia should be considered among main collaborators of the TC and ANBTB in this field

- A 360° design for all approach should be adopted[165]
- For the success of the actions, it is necessary to involve associations representing people with special needs

[165] See, for instance: https://dfaeurope.eu/

2.3.2 *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, helping to promote also Adventure and Nature-Based Tourism
Description	Implementation of VR and AR digital solutions for the valorization of Adventure and Nature-Based Tourism key sites and routes

Key activities	• Benchmark of international best experience
	• Implementation of a "Digital Adventure and Nature-Based Tourism Armenia plan", by foreseeing solutions such as:
	  ○ Virtual Reality and Augmented Reality at key sites and routes
	  ○ Mobile apps at key sites and routes
	  ○ Use of QR codes
	  ○ 360° accessibility to key sites and routes

Key Performance Indicators	• No. of site and routes for Adventure and Nature-Based Tourism 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	Tourism committee
Key stakeholders involved	• Tour Operators involved in Adventure and Nature-Based Tourism • Adventure Tourism Clubs and Groups (both formal and non-formal) • Armenian Adventure Travel Association • Armenia Travel (the team behind the "Armenia. Travel" [166] social media accounts on Facebook and Instagram) • AR Trails App[167] • Arloopa App[168] • 360stories-armenia App[169] • Zoomar AR App[170] • Arise 3D App[171] • My Virtual Armenia App[172] • Top Marketing Agencies in Armenia[173] • Armenian Marketing Association[174] • National Center for Marketing • Young Biologists Association • Brusov State University / Tourism Department • Yerevan State University / Tourism Department • The Transcaucasian Trail • Trails For Change NGO • SPNAs of Armenia • Ministry of High-Tech Industry • Ministry of Education, Science, Culture and Spor • Other relevant State Bodies / Institutions • Private sector / Local TSPs from the regions of Armenia
Source of funding	Public and private sector
Time frame	Since year 5
Recommendations	• 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 • The experience of already existing Armenian AR / VR / MR initiatives should be studied and taken into consideration • Virtual FAM-trips could be organized in the ANBTB headquarters in Yerevan and its representations in the regions, to introduce this new and highly technological feature of modern tourism • Some basic AR / VR / MR operating / usage skills could be included in the training modules which will be a part of overall educational segment of this project

[166] www.facebook.com/ArmeniaTravelOfficial
[167] https://artrails.app/
[168] https://arloopa.com/
[169] https://apps.apple.com/us/app/360stories-armenia/id1176860010
[170] https://itel.am/en/news/9832
[171] https://www.youtube.com/channel/UCFJw6U1pGVB_6VTcCH1yFfA
[172] http://farbridge.co/mva/
[173] https://agencyvista.com/lists/top-marketing-agencies-in-armenia/ https://www.sortlist.com/l/armenia-am
[174] https://armenianmarketing.com/en/ https://www.sortlist.com/l/armenia-am

- AR / VR / MR creation skills could be considered as part of skillset of the TOs, LGs and other TSPs, with a vision that offers all of them an alternative for other possible periods like Covid-19 lockdowns. This can be an interesting incentive for the representatives of Adventure and Nature-Based Tourism field, motivating them to get involved in AR / VR / MR industry with more energy

3. Promote positive impacts on host community and Armenian economy

3.1 Incentivate local micro-entrepreneurs

3.1.1 Introduce micro-grants mechanism for the Adventure and Nature-Based Tourism sector

Action	**3.3.1 Introduce micro-grants mechanism for the Adventure and Nature-Based Tourism 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 Adventure and Nature-Based Tourism enterprises
Key activities	• Evaluate the need of micro grants to local Adventure and Nature-Based Tourism enterprises • Define criteria for providing micro grants • Identification of key sites where implement the action • Approval of a national budget • Provision of micro-grants to local entrepreneurs, considering particularly to support youth and women entrepreneurship
Key Performance Indicators	• Criteria for micro-grants in 3 years • Each year providing at least 10 micro-grants to local Adventure and Nature-Based Tourism enterprises
Subject responsible	• Tourism committee • State bodies
Key stakeholders involved	• The Transcaucasian Trail • Armenian Adventure Travel Association • Ministry of Economy • Ministry of Health • Ministry of Education, Science, Culture and Sport • Ministry of Environments • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • Other relevant State Bodies / Institutions • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Local government bodies • Adventure Tourism Clubs and Groups (both formal and non-formal) • Student Unions at Universities • SPNAs of Armenia Armenian Camp NGO • Regions • Local government bodies • Private sector • Villages
Source of funding	Public and private sector
Time frame	Year 3
Recommendations	The action might require the approval of a specific legislative act

3.2 Increase awareness about Adventure and Nature-Based Tourism

3.2.1 Implement awareness campaign at national and local level

Action	3.1.1 Adopt the concept of Adventure and Nature-Based Tourism at local level
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.1 Involve local communities
Description	Acknowledge the Adventure and Nature-Based Tourism services, their values and benefits, adopt the concept of Adventure and Nature-Based Tourism on local level
Key activities	• Increase understanding of the Adventure and Nature-Based Tourism services and benefits of trees, woodlands and forests and how they are valued • Explore the impact of engaging with nature in terms of people's wellbeing • Review methods for integrating Adventure and Nature-Based Tourism services, value and benefits in forestry • Identify key factors that enable, mediate or restrict the realization of Adventure and Nature-Based Tourism benefits for different sections of the public • Identify priorities and challenges for future research in the field • Develop and harmonize social data and indicators within SPNAs across Armenia • Develop frameworks and practical advice for practitioners, policy makers • Research on all the economic benefits of human-nature interactions in Armenian context, use internationally available data to "translate" it to Armenian context (due to lack of local data on the subject)
Key Performance Indicators	The cultural ecosystem services, their values and benefits acknowledged The concept of Adventure and Nature-Based Tourism is adopted on local level
Subject responsible	Tourism committee
Key stakeholders involved	• Tour Operators involved in Adventure and Nature-based Tourism • Adventure Tourism Clubs and Groups (both formal and non-formal) • Armenian Adventure Travel Association • Armenia Travel (the team behind the "Armenia. Travel" [175] social media accounts on Facebook and Instagram) • Young Biologist Association • Bryusov State University / Tourism Department • Yerevan State University / Tourism Department • The Transcaucasian Trail • Trails For Change NGO • SPNAs of Armenia • Ministry of Health • Ministry of Environment • Ministry of High-Tech Industry • Ministry of Education, Science, Culture and Sport • Armenian Ecotourism Society • AUA Acopian Center for the Environments • Other relevant State Bodies / Institutions • Private sector / Local TSPs from the regions of Armenia
Source of funding	Public and Private, as well as international grants
Time frame	Since year 2
Recommendations	• Explore the field of Adventure and Nature-Based Tourism • Adapt the international best practices in the field • Collect data on overall health benefits for humans through frequent interaction with nature • Research on the local traditions and culture to find evidences of ancient philosophy and culture reflecting on Adventure and Nature-Based Tourism, which can help to reinterpret the modern variations on this field in a more practical way, also sounding more relevant to the local population

[175] www.facebook.com/ArmeniaTravelOfficial

4. Update of the institutional and legislative framework for Adventure and Nature-Based Tourism development

4.1 Regulate Adventure and Nature-Based Tourism professions and operators

4.1.1 Regulate Adventure and Nature-Based Tourism professions

Action	4.1.1 Regulate Adventure and Nature-Based Tourism professions
Strategic objective	4. Update of the institutional and legislative framework for Adventure and Nature-Based Tourism development
Specific objective	4.1 Regulate Adventure and Nature-Based Tourism professions and operators
Description	The action foreseen the regulation of Adventure and Nature-Based Tourism professions so as to increase the quality of tourism service provided and to accrue value generated by tourism activities
Key activities	• Regulate Adventure and Nature-Based Tourism professions by fixing the main knowledge, skills needed from Adventure and Nature-Based Tourism specialists in educational programs • Introduce coherent high level of education in Adventure and Nature-Based 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	Approval of legislation about Adventure and Nature-Based Tourism professions in 3 years
Subject responsible	Tourism Committee
Key stakeholders involved	• Tour Operators involved in Adventure and Nature-Based Tourism • Adventure Tourism Clubs and Groups (both formal and non-formal) • Armenian Adventure Travel Association • Armenian Tourism Institute • Young Biologists Association • Bryusov State University / Tourism Department • Yerevan State University / Tourism Department • Erasmus Plus Armenia office • AUA / Acopian Center for the Environment • My Forest Armenia • Study in Armenia • Business Support Center • The Transcaucasian Trail • Trails For Change NGO • HikeArmenia Foundation • Janapar Trail • SPNAs of Armenia • Armenian Hiking and Mountaineering Federation • Armenian Ecotourism Association • Armenian Institute of Physical Culture • Ministry of Education, Science, Culture and Sport • Ministry of Economy • Ministry of Environment • Ministry of Emergency Situations • Ministry of Health • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • Other relevant State Bodies / Institutions • Education Inspectorate • Urban Development, Technical Standards and Fire Safety Inspectorate • Armenian Apostolic Church • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia
Source of funding	Public sector
Time frame	Year 2
Recommendations	• A successful, responsible, and safe adventure tourism operation requires a more expansive set of skills and processes than the purely technical, such as managing diverse groups of people or entertaining guests of different ages. However, due to the difficulty in defining and scaling “softer” skill education programs (particularly across cultures), most regional, national, and market-based training programs focus on technical safety and environmental standards.

- While there are numerous technical activity standards and tourism quality assurance systems with relevance to adventure tourism, the only internationally recognized standard specific to adventure tourism is the ISO Adventure Tourism Safety Standard: ISO/ TC 228 WG 7[176].

[176] The ISO Adventure Tourism Safety Standard, ISO/ TC 228 WG 7 is the only official, international adventure tourism standard. The policy's adoption occurred in the spring of 2014 and addresses the ideation, structure, creation, and process of effective safety management systems and resources for consumers, buyer operators, and tourism organizations involved in adventure tourism activities. Source: The International Organization for Standardization: http://www.iso.org/iso/home/store/catalogue_tc/catalogue_detail.htm?csnumber=54857 (24-09- 2014).

4.1.2 Regulate Adventure and Nature-Based Tourism NGOs

Action	4.1.2 Regulate Adventure and Nature-Based Tourism NGOs
Strategic objective	4. Update the institutional and legislative framework for Adventure and Nature-Based Tourism development
Specific objective	4.1 Regulate Adventure and Nature-Based Tourism professions and operators
Description	The action foreseen the regulation of Adventure and Nature-Based 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	• Explore international experience of regulating Adventure and Nature-Based Tourism NGOs • Analyze NGOs and their activities in Adventure and Nature-Based Tourism in Armenia • Regulate the NGOs of the sphere
Key Performance Indicators	• Approval of legislation about Adventure and Nature-Based Tourism NGO within 3 years • No. of NGOs operating in Adventure and Nature-Based Tourism field
Subject responsible	Tourism committee
Key stakeholders involved	• The Transcaucasian Trail • Janapar Trail • Armenian Adventure Travel Association • SPNAs of Armenia[177] • Caucasus Nature Fund • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • Ministry of Economy • Ministry of Environment • Ministry of Emergency Situations • Ministry of Labor and Social Affairs • Ministry of Territorial Administration and Infrastructure • Market Surveillance Inspection Body • State Revenue Committee • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • State supervision service of the Republic of Armenia • Armenian-German intergovernmental commission on financial and technical cooperation • Armenian-Austrian joint commission on trade-economic and scientific-technical cooperation • Armenian-Czech intergovernmental commission on economic cooperation • UNDP Armenia office • GIZ Armenia office • Other relevant State Bodies / Institutions • Standing Committee on Economic Affairs[178] • Standing Committee on European Integration • Standing Committee on Labor and Social Affairs • Standing Committee on State and Legal Affairs • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Adventure Tourism Clubs and Groups (both formal and non-formal) • General population of Armenia
Source of funding	Public sector
Time frame	Year 2
Recommendations	Take advantage of international experience of countries with most advanced Adventure and Nature-Based Tourism sector

[177] Specially Protected Nature Areas
[178] This and other "Standing Committees are part of the Armenian Parliament http://www.parliament.am/committees.php?lang=eng

4.2 Regulate access to Protected Areas

4.2.1 Create a functional well-organized payment system for entry to PAs

Action	4.1.1 Create a functional well-organized payment system for entry to PAs
Strategic objective	4. Update of the institutional and legislative framework for Adventure and Nature-Based Tourism development
Specific objective	4.1 Regulate access to Protected Areas
Description	Creation of a well-functioning revenue collection system which will ensure not only smooth flow of financial resources into the PAs, but will also guarantee better statistics collection and will improve the customer satisfaction at the Armenian PAs
Key activities	• Try experimental voluntary payment system for trail usage and services at the PAs • Adjust the payments (lowering) according to the actual services, not to create an impression that it is overpriced, especially in cases when the actual products the visitors are paying for are not satisfactory • Improve the payment transparency so that it will be clearly visible what is paid for what • Introduce an experimental additional Voluntary Payment System (VPS) with multiple donation boxes (indoor simple ones inside both VC's or outdoor with lock "iron rangers" by the campsites at the VC's) at the PAs (mainly national parks as pilot stage) • Outsource activities that provide revenue-sharing (i.e. guiding, horseback riding) and products / services (i.e. offering high resolution topographic maps useful for navigation, souvenirs, food products, etc. This will not conflict with the fact of offering general maps for free.).
Key Performance Indicators	• Approval of the payment system • Introduction of the payment system in Pas
Subject responsible	Tourism Committee
Key stakeholders involved	• Armenian Adventure Travel Association • SPNAs of Armenia[179] • Caucasus Nature Fund • Ministry of Economy • Ministry of Environment • Ministry of Labour and Social Affairs • Ministry of Territorial Administration and Infrastructure • Market Surveillance Inspection Body • State Revenue Committee • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • State supervision service of the Republic of Armenia • Armenian-German intergovernmental commission on financial and technical cooperation • Armenian-Austrian joint commission on trade-economic and scientific-technical cooperation • Armenian-Czech intergovernmental commission on economic cooperation • UNDP Armenia office • GIZ Armenia office • Other relevant State Bodies / Institutions • Standing Committee on Economic Affairs[180] • Standing Committee on European Integration • Standing Committee on Labour and Social Affairs • Standing Committee on State and Legal Affairs • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Adventure Tourism Clubs and Groups (both formal and non-formal) • General population of Armenia
Source of funding	Public sector
Time frame	Year 3
Recommendations	• It would be very useful to have a functional well-organized payment system for entry, including online payment with 24/7 customer support desk • All of these alternative payment methods would be more effective at raising revenue than collecting entrance fees at the main entrances. Any alternative to collection of fees (for example creating more entrances) would be difficult and costly to implement, also given the lack of clear demarcation signs of PA borders, many domestic visitors may refuse to pay if they are not aware that they are inside the particular PA.

[179] Specially Protected Nature Areas
[180] This and other "Standing Committees are part of the Armenian Parliament http://www.parliament.am/committees.php?lang=eng

4.3 Regulate the tourism statistics collection

4.3.1 Implement visitor statistics at Adventure and Nature-Based Tourism sites

Action	4.3.1 Implement visitor statistics at Adventure and Nature-Based Tourism sites
Strategic objective	4. Update of the institutional framework for Adventure and Nature-Based Tourism development
Specific objective	4.3 Regulate the tourism statistics collection
Description	Implementation of a system for collecting visitor statistics at Adventure and Nature-Based Tourism sites, such as PAs and main routes

Key activities	• 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
	  ○ 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 Adventure and Nature-Based Tourism sites
	  ○ Organize data collection via tourism info centers
	  ○ Collect statistical data periodically

Key Performance Indicators	• System of data collection techniques in 3 years • Collecting data on Adventure and Nature tourists' in 3-5 years
Subject responsible	Tourism committee
Key stakeholders involved	• Armenian Adventure Travel Association • SPNAs of Armenia[181] • Tourism info-centers • Ministry of Economy • Ministry of Environment • Ministry of Labour and Social Affairs • Ministry of Territorial Administration and Infrastructure • Market Surveillance Inspection Body • State Revenue Committee • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • State supervision service of the Republic of Armenia • Armenian-German intergovernmental commission on financial and technical cooperation • Armenian-Austrian joint commission on trade-economic and scientific-technical cooperation • Armenian-Czech intergovernmental commission on economic cooperation • UNDP Armenia office • GIZ Armenia office • Other relevant State Bodies / Institutions • Standing Committee on Economic Affairs[182] • Standing Committee on European Integration • Standing Committee on Labour and Social Affairs • Standing Committee on State and Legal Affairs • Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Adventure Tourism Clubs and Groups (both formal and non-formal) • Adventure and Nature sites • Other State Bodies • Universities and research centers • Hotel facilities • Local government bodies • Ministry of Economy • Regional Governments
Source of funding	Public sector
Time frame	Year 3
Recommendations	• Explore the international experience of gathering statistical data on Adventure and Nature sites • Pay attention to engage all stakeholders in the process of gathering statistical data

[181] Specially Protected Nature Areas
[182] This and other "Standing Committees are part of the Armenian Parliament http://www.parliament.am/committees.php?lang=eng

- 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, 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.

Implement visitors and residents' satisfaction surveys

Action	4.3.2 Implement visitor and residents' satisfaction surveys
Strategic objective	4. Update of the institutional framework for Adventure and Nature 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	• 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 Adventure and Nature-Based Tourism sites among tourists • Identify key Adventure and Nature sites where surveys have to be applied • Organize surveys at Adventure and Nature 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 Adventure and Nature-Based Tourism • Organize quality research studies of Adventure and Nature-Based 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	• Elaboration of a survey in 1 year • Organizing a survey in 1 year in every key Adventure and Nature-Based Tourism site
Subject responsible	Tourism committee
Key stakeholders involved	• Armenian Adventure Travel Association • SPNAs of Armenia[183] • Tourism info-centers • Ministry of Economy • Ministry of Environment • Ministry of Labour and Social Affairs • Ministry of Territorial Administration and Infrastructure • Market Surveillance Inspection Body • State Revenue Committee • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • State supervision service of the Republic of Armenia • Land and Culture • Armenian General Benevolent Union (AGBU) • Armenian Relief Society (ARS) • Fund for Armenian Relief (FAR) • Habitat for Humanity (HfH) • Cafesjian Family Foundation • Children of Armenia Fund (COAF) • Fast For Armenia • Armenian Educational Relief Foundation (AERF) • Armenian Educational Benevolent Union (AEBU) • Menq (Menk) • Hamazkayin Armenian Educational and Cultural Society • Tekeyan Cultural Association • Armenian Dramatic Arts Alliance • Other organizations involved in management of Adventure and Nature-Based Tourism sites • United Armenian Fund • UNDP Armenia office • GIZ Armenia office • Other relevant State Bodies / Institutions • Standing Committee on Economic Affairs[184] • Standing Committee on European Integration • Standing Committee on Labour and Social Affairs • Standing Committee on State and Legal Affairs • Tour Operators involved in Adventure and Nature-Based Tourism

[183] Specially Protected Nature Areas
[184] This and other "Standing Committees are part of the Armenian Parliament http://www.parliament.am/committees.php?lang=eng

	• Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Adventure Tourism Clubs and Groups (both formal and non-formal) • Adventure and Nature sites • Other State Bodies • Universities and research centers • Hotel facilities • Local government bodies • Regional Governments • Research organizations • Universities • Tourists (both domestic and international)
Source of funding	Public and private sector
Time frame	Year 4
Recommendations	• 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. Development of infrastructure for Adventure and Nature-Based Tourism

5.1 Audit of the existing infrastructures and development of master plans for hard infrastructure refurbishment/upgrades

5.1.1 Audit of the existing infrastructures

Action	5.1.1 Audit of the existing infrastructures
Strategic objective	5. Development of infrastructure for Adventure and Nature-Based Tourism
Specific objective	5.1 Analysis and Diagnosis
Description	Establish effective communication with all the organizations responsible for the creation and maintenance of hard infrastructures for Adventure and Nature-Based Tourism. Organize a complex audit of the hard infrastructures.
Key activities	• Create an up-to-date contact database of all the local and foreign groups and organizations, which were / are involved in the refurbishment, creation and maintenance of a number of different types of hard infrastructures of Adventure and Nature-Based Tourism in Armenia. • Create a working group (board) responsible for the communication between the Tourism Committee and the organizations dealing with hard infrastructure creation / maintenance • Schedule / implement regular meetings and workshops between the mentioned organizations, discuss existing and new master plans for creation of new hard infrastructures • Schedule / implement field visits to examine the current condition of existing hard infrastructures in Armenia, archive the collected data and prepare for reporting to the working group (board)
Key Performance Indicators	• All the information about the existing hard infrastructures of Adventure and Nature-Based Tourism is up-to-date, the stakeholders and their activities are synced
Subject responsible	Tourism Committee
Key stakeholders involved	• Armenian Adventure Travel Association • SPNAs of Armenia[185] • Tourism info-centers • Ministry of Economy • Ministry of Environment • Ministry of Emergency Situations • Ministry of Territorial Administration and Infrastructure • Statistics Committee • Urban Development, Technical Standards and Fire Safety Inspectorate • The Transcaucasian Trail • Trails for Change NGO • HikeArmenia Foundation • Janapar Trail • Caucasus Nature Fund • Armenian Hiking and Mountaineering Federation • Armenian Institute of Physical Culture • UNDP Armenia office • GIZ Armenia office • Standing Committee on Economic Affairs[186] • Standing Committee on European Integration • Standing Committee on Labor and Social Affairs • Standing Committee on State and Legal Affairs • Other relevant State Bodies / Institutions Tour Operators involved in Adventure and Nature-Based Tourism • Educational Institutions which have departments of Tourism and related subjects • Private sector / Local TSPs from the regions of Armenia • Adventure Tourism Clubs and Groups (both formal and non-formal)
Source of funding	Public and private sector
Time frame	Year 2
Recommendations	• Explore the international experience of assessing the conditions of hard infrastructures of Adventure and Nature-Based Tourism • Take care of engaging all the stakeholders in the process of gathering necessary data • Collaborate with local communities, local and international organizations, local governments on data collection process Collaborate with organizations specialized in exploration, creation and maintenance of hiking, horseback riding, mountain biking and other routes/ trails

[185] Specially Protected Nature Areas
[186] This and other "Standing Committees are part of the Armenian Parliament http://www.parliament.am/committees.php?lang=eng