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**Preparation of Destination Management Organization (DMO)
Development Model for the Republic of Armenia**

Ref. Number: DMO-01

ASSIGNMENT 2

TASK 4

Tourism Niches Identification and Development Plans

Niche 6: WINTER TOURISM

Deadline: 10.11.2022

ARS Progetti SPA

in association with ARPA Environmental Foundation



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Project Title: Preparation of Destination Management Organization (DMO) Development Model for the Republic of Armenia

Client: Armenian Territorial Development Fund; Tourism Committee of RA

Document Title: TASK 4 Tourism Niches Identification and Development Plans

Niche 6: WINTER TOURISM

Document Publication History:

Date	Author	Co-Authors	Version	Remark
10 th November 2022	<i>Roberto Formato, Team Leader and Tourism Development Expert</i>		1	-
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5 th December 2022	<i>Roberto Formato, Team Leader and Tourism Development Expert</i>		2	-
30 th January 2023	<i>Roberto Formato, Team Leader and Tourism Development Expert</i>		3	-
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5 th December 2022	<i>Daniele Fanciullacci (Chief Executive)</i>	-
30 th January 2023	<i>Daniele Fanciullacci (Chief Executive)</i>	-

Distribution:

Version	Name	Location	No. Copies
1		Rome	1 soft copy
2		Rome	1 soft copy



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LIST OF ABBREVIATIONS

Abbreviation	Definition
AR	Augmented Reality
B&B	Bed and Breakfast
CJSC	Closed joint-stock company under the Russian law
DM	Destination Management
DMO	Destination Management Organization
EU	European Union
GHG	Greenhouse Gas
GSTC	Global Sustainable Tourism Council
ha	Hectares
IT	Information Technology
ITF	International Transport Forum
LWDP	Local Winter (tourism) Development Plans
m.	(abbrev.) meters
ml.	(abbrev.) million
MSMEs	Micro Small Medium Enterprises
N.	(abbrev.) North
NGO	Non-governmental Organization
NOCA	National Olympic Committee
PPP	Public Private Partnership
QR	Quick Response (code)
RA	Republic of Armenia
S.	(abbrev.) South
SA	Study Area
SECO	State Secretariat for Economic Affairs
SMEs	Small and Medium Enterprises
SMM	Social Media Marketing
TC	Tourism Committee
ToR	Terms of Reference
UNEP	United Nations Environment Programme
USD	United States Dollars
VR	Virtual Reality



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1. EXECUTIVE SUMMARY

1.1. Articulation of the report

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

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

Particularly, the present task analyses the niche “**Winter 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 Winter Tourism along with a profiling of winter tourism travelers, which is traced by different researches around the world. A brief historical background is provided, along with a description of international winter tourists, which can represent a market source for the niche. Travel motivations are investigated along with expected tourism experiences. Key data refer mainly to the European Alpine experience, which in the last decades had to face some major challenges, such as depopulation of mountain areas and reduction of snow due to climate change.

Emerging patterns are thus deepened and, thanks also to international best practice analysis, it is provided an insight with regard to key main issue, such as: (i) the long-lasting impact of Covid-19 pandemic; (ii) the adaptation of ski mountain destinations to climate change by snowmaking and upgrade of services and infrastructure to cater to the needs of the for traditional winter tourism demand; (iii) the differentiation of the supply by introducing new tourism products targeting the “green” no-winter season too; (iv) the introduction of new accommodation concepts aimed at promoting formulas based on local assets valorization, such as the “Albergo diffuso” (scattered hotel); and (v) the application of digital technologies to enhance the visitor experience. Finally, the value chain tool is introduced as an instrument capable to detail primary and secondary activities that can be adapted to address the specific needs of the winter tourism segment.

The second section analyzes the current **performance of winter tourism in Armenia**. It uses secondary sources, integrated – in many cases - by primary ones, as reported in Annex II. It includes analysis of:

- i. the supply, which is differentiated in sub-winter tourism products, such as skiing resorts, hot springs, winter at Yerevan, and other localized tourism services and activities
- ii. the relevant current experiences, based on personal interviews of the team with key actors, such as at the Ashotsk Ski Centre, at the Lernanist village, at the Mets Sepasar community, at Tsaghkadzor;
- iii. the demand, distinguishing among international and domestic demand, with data however constrained by currents lacks in collecting methods;
- iv. key winter tourism stakeholders, including Government actors, private operators and NGOs in involved in sports and mountain activities;
- v. main challenges facing tourism in mountain areas with particular regard to environmental impacts related to sport activities and infrastructure but also the effects of climate change, which very relevant for mountain tourism.

The section concludes with the formulation of the **SWOT analysis** of the Armenia winter tourism niche, which allows to highlight key gaps to be covered for its development. The synthesis 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 portfolio of contemporary winter resorts based on sports and health
2. Assurance of the market visibility and accessibility of such portfolio
3. Increase of the economic impact from winter tourism



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4. Adaptation of the institutional framework for winter tourism development

To each strategic objectives corresponds a hand of **specific objectives**, which in turn bring to **key actions**. Each action is represented, in **Annex 3 – 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 providing economic benefits, limiting socio-cultural problems and encouraging community involvement, as well as preventing negative environmental impacts. Planning of manpower, adaptation of legislation and implementation of investment policies and particularly micro-incentives are also considered as essential tools to ease the implementation of the plan. Governance and management of the tourism niche, both at the national and at the local level is finally discussed.

1.2. Key findings and recommendations

Winter tourism currently represent a relevant tourism niche for Armenia. Nevertheless, the analysis shows that the sector currently suffers from the obsolescence of most relevant resorts, such as **Tsaghkadzor** or the above-mentioned **Jermuk**. The first pillar of the strategy is therefore the creation of a **competitive portfolio of winter resorts (and activities) based on sports and health**, to be organized and updated according to international standards. Such pillar is articulated in three specific objectives, which include:

- The upgrading of existing main skiing and health resort (Tsaghkadzor, Jermuk), followed progressively by minor ones, based of development plans agreed and possibly implemented, also through accessing to PPP, with key private operators;
- Organize agenda of winter tourism events, both leisure and sports, by particularly providing evidence to Armenian authentic experiences, such as Yugikassen competitions, or Armenian winter cuisine, along with more traditional ones;
- The increase of capacity of winter tourism operators, by developing educational and training programs particularly for the private sector (e.g. ski and snowboard instructors) while taking advantage of cooperation with Armenian NGOS and Universities, as well as international institutions, such as EU border programs, to promote international training exchange initiatives especially targeted to youth ad women.

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

Meanwhile, it is advised to take advantage of two key trends of the sector. The first is fuelled by the demand, which sees an increased unsatisfied request of accessible tourism by people bringing special accessibility needs (visible and not), as witnessed by several researches. The second refers to the increasing popularity of digital tool to provide virtual, augmented or mixed experiences. Such tools might be conveniently used in winter tourism so as to enhance the visitor experiences, as for instance by accessing snow level information or climatic conditions at distance.

Winter tourism development has been studied by providing great attention to the **maximization of positive economic and social impact for host communities and Armenia economy more generally**, which represents the third strategic objective of the action plan. Such objective is articulated in two specific objectives.



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The first goes through the involvement of local communities, which is pursued trying to promote cultural ecosystems (mountain districts) and by stimulating the adoption of new tourism accommodation services, such as the scattered hotels. The approach replicated models that have been successfully experienced in winter tourism destinations worldwide, particularly at Alpine regions. Such objectives are pursued also by the introduction of micro-grants mechanism for the winter tourism sector, paying particularly attention to youth and women involvement.

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 winter tourism development** thus represents the fourth pillar of the strategy, which encompasses the regulation of winter tourism professions, including the recognition of ski or snowboard instructors, which is currently missed in Armenia, along with the regulation of mountain accommodation, such as scattered hotels or mountain refuges, which can add much value to attracting international tourists.

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

As requested by TORs, 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 be prepared soon. They include regulatory acts, capacity building and other soft interventions such as the formulation of national agenda of winter festivals or marketing actions. Hard interventions, such as the upgrading of winter and health resorts will take more time, but should in case be planned much in advance, as they require much more effort, also related to involvement and coordination of private actors and other institutions, as well as for implementing environmental assessments if needed.



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2. CONCEPTUAL FRAMEWORK

2.1. Definition of Winter Tourism

Winter Tourism is generally associated with sports tourism and is considered by UNWTO as part of the broader “mountain tourism”, which encompasses other niches such as walking tourism, adventure and sport activities¹.

The season is the coldest season of the year, astronomically from the December solstice to the March equinox in the N hemisphere and at the opposite time of year in the S hemisphere² and therefore tourism products and services mainly to sports and activities which fit such atmospheric conditions, such as ski, ice-skating, snowboard, etc. These are conducted in mountain environments, which include around 27% of the world’s land surface³ and are typically classified in various elevation classes⁴.

2.2. Profile of Winter Tourists

2.2.1. Historical background

Winter sports were introduced by the British leisure classes at the Swiss villages of Zermatt (Valais) and St. Moritz in 1864. The first winter sports package holidays took place in 1902 at Adelboden, Switzerland. They were a natural answer for a leisure class looking for amusement during the coldest season. Therefore, winter tourism has usually been considered to respond to a vacation attitude where tourists combine winter sports with relaxing.

2.2.2. General profile

The profile of winter tourists can be traced from various researches conducted around the world. Results are not consistent, as they refer to the various subniches which compose mountain tourism, such as organized sport, adventure, ecotourism, etc.:

- a survey conducted in the Kaimaktsalan ski center, in Greece, found out that they are mainly women (61.4%), single (37.1%), 17-39 years-old (80%), university graduates (44.3%), with full-time occupation (45.7%) and with a family income of 20.000-60.000 euro (48.6%)⁵;
- another survey showed that mountain bicyclists of Chattanooga, Tennessee (USA) are mainly male (70%), middle age is 40, with bachelor degree (56.3%)⁶;
- at the Changbai Mountain Biosphere Reserve (China) it was found that the demographic profile of tourists was as follows: male (51.7%), age (18-44), single (35.3%), family with children (34.5%)⁷.

2.2.3. Travel motivations and expected tourism experience

Above mentioned researches prove that we cannot refer to one only “winter tourist” profile, but we have to refer to specific motivation. Expected tourism experiences will vary accordingly.

For instance, the above-mentioned research in Greece about winter tourism destinations found that there are differences between **gender** and **age** concerning the choice of a tourism products, with males more drawn towards challenge and competition, while females spend less time outdoors and place importance on social items. A similar impact is generated by age level.

Educational is another predictor for leisure and tourism activities, with groups who are better educated being more physically active in their leisure time.

¹ Romeo, R., Russo, L., Parisi, F., Notarianni, M., Manuelli, S. and Carvao, S., 2021. Mountain tourism—Towards a more sustainable path.

² Source: [Winter Tourism](#)

³ Romeo, R., Russo, L., Parisi, F., Notarianni, M., Manuelli, S. and Carvao, S., 2021. Op. cit.

⁴ They include: Class 1: elevation $\geq 4\ 500$ m; · Class 2: elevation 3 500–4 500 m; · Class 3: elevation 1 500–2 500 m and slope $\geq 2^\circ$; · Class 5: elevation 1 000–1 500 m and slope $\geq 5^\circ$ or LER > 300 m; · Class 6: elevation 300–1 000 m and LER > 300 m. IN Kapos, V., Rhind, J., Edwards, M., Price, M.F. and Ravilious, C., 2000. Developing a map of the world’s mountain forests. In *Forests in sustainable mountain development: a state of knowledge report for 2000. Task Force on Forests in Sustainable Mountain Development*. (pp. 4-19). Wallingford UK: Cabi Publishing

⁵ Georgia Yfantidou, Malamati Nikou, Ourania Matsouka, [Winter tourism in Greece: An approach to tourists’ behavior and needs](#), 2018, *Geojournal of Tourism and Geosites*, 21(1):74-87

⁶ Tourist Profile: Mountain Bicyclist, <https://www.utc.edu/sites/default/files/2020-12/mtnbikenew.pdf>

⁷ Gu XP, Lewis BJ, Li YQ, et al. (2015) Travel motivation of domestic tourists to the Changbai Mountain Biosphere Reserve in Northeastern China: a comparative study. *Journal of Mountain Science* 12(6). DOI: 10.1007/s11629-015-3563-1



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The same is true for **environmental awareness**, which is growing in many tourism originating countries. Nature Seekers are generally motivated by socialising and looking for relaxation and escape in nature as main domains in their leisure time. Such tourists – whose leisure behaviour is more oriented towards nature, relaxation and social interaction – make tourism choices based on their habits in their home environment⁸.

From the supply-side, winter tourism does also refer to very different tourism products. An analysis of German winter holidays indeed indicates that winter sports are only one of several product types. The fact that the majority of German travelers prefer long-haul warm weather destinations in the winter raises the question of triggering factors for winter holiday trips.

A qualitative study based on a Germany-wide online discussion forum analyzed all aspects of winter trips. It centered on people's everyday life during the winter and their linked emotions, travel motives, destination choices and general expectations, in particular with relation to trips to Alpine destinations. The results showed that the grey winter weather and factors such as cold, humidity, lack of sun and dull atmosphere are the dominant factors in the desire to escape on a holiday trip. Non-skiers expect snow-covered landscapes and an environment conducive to relaxation-related activities and are therefore likely to be looking for sustainable winter products. This supports the Alpine destination managers approach to developing sustainable winter products in addition to winter sports, in order to become more competitive in the non-skier market⁹.

The main motives of tourists to the Changbai Mountain Biosphere Reserve (China) include wilderness-undisturbed nature, geological and geomorphic landscape, good ecological environment, and unique landscapes (crater lake, waterfall, gorge and hot spring)¹⁰.

Expected tourism experience for winter tourists are:

- leisure and relaxation in nature;
- satisfaction with their physical and psychological needs;
- participation at winter sports.

2.2.4. International markets and emerging trends

2.2.4.1. Traditional destinations

Mountains cover about 27 percent of the world's land surface, ranging over every continent and all major types of ecosystems, from deserts and tropical forests to polar icecaps.

According to the UNWTO¹¹, **in Europe the Alps are the most frequently visited mountain**. Before the COVID-19 pandemic an average of 120 million people visited Alpine regions annually. The Alps have more than 600 ski resorts and 10,000 ski-lifts, with 85 percent of alpine skiing concentrated in France, Switzerland, Austria and Italy. The Rhone-Alps region in France recorded 51.5 million total overnight stays in 2019¹², while in Slovenia, in 2019, the highest number of overnight stays was recorded in mountain resorts – around 4.6¹³. Other important European mountains include the Pyrenees (Spain, France and Andorra), the Dinaric Arc (along all the western Balkan countries), and the Caucasus Mountains spanning Europe till Asia (Armenia, Azerbaijan, Georgia, Iran, the Russian Federation and Turkey).

Switzerland is particularly focused on winter tourism, offering much to do, starting from snow activities and winter sports to relaxing and simply enjoying the picturesque mountains. Many tourist destinations are here easily approachable thanks to the trains, cable cars and ferries as the most efficient means of the Swiss public transport system¹⁴. The country offers plenty of things to do for non-skiers, too. The snow fun continues off the slopes, with trails for snowshoeing, ice-skating on frozen lakes, along with great dining and shopping¹⁵.

⁸ Georgia Yfantidou, Malamati Nikou, Ourania Matsouka, Op. cit.

⁹ Bausch T, Unseld C. Winter tourism in Germany is much more than skiing! Consumer motives and implications to Alpine destination marketing. *Journal of Vacation Marketing*. 2018;24(3):203-217. doi:10.1177/1356766717691806

¹⁰ Gu XP, Lewis BJ, Li YQ, et al. (2015) Travel motivation of domestic tourists to the Changbai Mountain Biosphere Reserve in Northeastern China: a comparative study. *Journal of Mountain Science* 12(6). DOI: 10.1007/s11629-015-3563-1

¹¹ Romeo, R., Russo, L., Parisi, F., Notarianni, M., Manuelli, S. and Carvao, S., 2021. Op. cit.

¹² https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_statistics_at_regional_level&oldid=574126

¹³ <https://www.stat.si/StatWeb/en/News/Index/9435>

¹⁴ Valmira Rashiti, [Switzerland in Winter: Things to Do and Places to See](#)

¹⁵ Diana Bocco, [15 Top Things to Do in Winter in Switzerland](#)



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Among Swiss destinations, Zermatt is one of Europe's best known mountain resorts. It commands an iconic position at the foot of the mighty Matterhorn, an ever-present snowy pyramid on the skyline. Between November 2018 and October 2019, such destination attracted 2.3 million overnight bookings¹⁶.

2.2.4.2. Emerging post-Covid trends

The economic, psychological and emotional repercussions of the COVID-19 pandemic on tourism demand are still emerging and are likely to continue at least until the pandemic is over¹⁷.

According to the above-mentioned UNWTO report, COVID-19 changed tourists' priorities, values and behavior. As a consequence, **travelling as safely and healthily as possible** is now a high priority.

Consumers' **awareness of the environmental and social impacts of their travel choices** is also greater, reinforcing a trend that started before the pandemic. These preferences can be accommodated by responsible and more sustainable tourism, while leading to a wider territorial distribution of tourists.

Due to travel restrictions imposed during the COVID-19 pandemic, tourism demand was indeed increasingly oriented towards **domestic and proximity tourism**, with a **preference for natural areas and rural environments**, offering authentic and regenerative experiences. If well managed, these preferences represent opportunities for mountain regions, with the following segments likely to be positively affected:

- *Nature-based tourism* – Mountains are ideal destinations for those who seek solace and respite from city life and the COVID 19 pandemic;
- *Health and well-being* – According to the Global Wellness study (2021), the "integrated wellness" market is expected to grow by USD 1.3 trillion by 2024. This could offer valuable opportunities for tourism in mountain areas.
- *Living local* – The pandemic is proving an opportunity to rethink products and services. Staycations¹⁸ and domestic travel are likely to be priorities for many leisure tourists, certainly in the short term.
- *Doing good* – Visitors in the post-COVID era are looking for experiences that combine their wellness with that of the planet. However, they often lack the information needed to travel in a more sustainable way. When properly planned, managed and communicated, mountain tourism can offer an opportunity to meet tourists' desire to contribute to sustainability.

Among the emerging trends, the COVID-19 crisis also provides an opportunity for **rural and remote destinations** (including mountain ones) to attract remote workers and digital nomads for a longer period of time, contributing to local development and helping to reverse population decline. Since the beginning of the COVID-19 pandemic, the booming digital nomad movement has involved many mountain destinations. One example is The *Mountain Coworking Alliance*¹⁹, a collective of independent co-working spaces in mountain towns around the world.

2.2.5. Key specialized tour operators

Key specialized tour operators can be traced out of published market research. TourRadar Travel Experts reviewed traveler feedback on all ski tour operators and hand-selected the top companies with the best reviews across the board. HOFNAR²⁰ ranks first with an average rating of 5 out of 5 stars for its tours in Switzerland²¹.

¹⁶ Romeo, R., Russo, L., Parisi, F., Notarianni, M., Manuelli, S. and Carvao, S., 2021. Op. cit.

¹⁷ See, for instance Bratić, M., Radivojević, A., Stojiljković, N., Simović, O., Juvan, E., Lesjak, M. and Podovšovnik, E., 2021. Should I stay or should I go? Tourists' COVID-19 risk perception and vacation behavior shift. *Sustainability*, 13(6), p.3573.)

¹⁸ A holiday spent in one's home country rather than abroad, or one spent at home and involving day trips to local attractions

¹⁹ Source: <https://mca-community.mystrikingly.com/>

²⁰ Source: [The Hofnar experience](#)

²¹ Source: [Ski travel companies](#)



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	RATING	TOURS	DESTINATIONS
1. the HOFNAR experience	5	3	Switzerland
2. Haka Tours	4.7	5	New Zealand
3. Exodus	4.6	8	Norway, Italy
4. Fresh Adventures	4.5	5	Canada

Table 1: Ski tour operators

TourRadar also shows 140 best Ski, Snowboard & Snow tours across the world²².

2.2.6. International best practices

2.2.6.1. Climate change adaptation for ski resort destinations – Mount Baw Baw, Australia

The Baw Baw National Park is a 13,530 hectare (ha) protected area located in the south eastern corner of Australia, approximately 120 km east of the major city of Melbourne. Mount Baw Baw is one of several peaks on the Baw Baw Plateau. The mountain peak is relatively low at 1 567 m, generating a subalpine climate.

The Mount Baw Baw Alpine Resort²³ is a 30 ha lease area surrounded by the National Park. It is dominated by the winter season, and:

- averages 50,000 to 70,000 visits per annum, making it the least visited of all of Australia's alpine resorts;
- has high visitation from "first timers" and "beginners";
- has an ethnically-diverse visitor demographic;
- its visitors during the 2015 winter spent on average USD 35–44 per person per visit;
- it contributes approximately USD 5.85 million to the Baw Baw Shire's headline Gross Regional Product;
- induced a total annual equivalent resident employment opportunity of 178 (0.8 percent of the Local Government Area total).

However, because of climate change, with the duration of the snow season likely to become shorter and generating lower maximum natural snow depths, profitability from the "white season" was no longer considered sufficient. This forced the resort to depend on government assistance funding of USD 2.34–3.9 million per year to meet operational expenditure requirements that are not covered by operational revenues.

Therefore, in 2016, resort management decided to start transitioning towards a "green season" focus, so as to increase yield from vacant infrastructure and facilities and make the overall operation sustainable. Two options were developed:

- the first option was to work with all the other alpine resorts, aiming at specializing and positioning to minimize duplication and maximize competitiveness while meeting changing visitors' needs;
- the second option, the one that was accepted, focused on reinventing and then repositioning through an offer that was less impacted by climate change.

It was proposed to use the repositioning to introduce a staged shift in target markets, aligned to the staged implementation of mountain tourism product reinvigoration. The implementation plan inter-linked repositioning, target markets, product development, infrastructure and marketing along short, medium and long term:

- in the *short term* (first two years), a number of economic initiatives were proposed to improve the offer across all seasons. Most of the recommended product development strategies were based on bringing simple snow play into the green season, by trialing dry slopes and magic carpets. Mount Baw would be differentiated from other resorts by offering a version of snow play all year round;
- in the *medium term* (three to five years) it was proposed scaling up investment in tourism product development to improve depth of offer and subsequent length of stay and revenue from white and green seasons;

²² Ski, Snowboard & Snow Tours & Trips, <https://www.tourradar.com/f/ski-snowboard-snow>

²³ <https://www.mountbawbaw.com.au/>



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- enhancement of the main ski run to deliver easily accessible white and green season skiing, featuring chair lifts, dry slope, bouldering and a snow factory to make snow outside the limiting temperature range currently possible;
- development of a two-level school programme, featuring adventure facilities and environmental education challenges;
- In the *long term* (six to ten years) it was proposed a focus on creating a significant indulgence experience and self-contained accommodation to convert the activity investments into room night revenue.

► As many mountain tourism ski resorts like Mount Baw will face increasing volatility due to climate change, much of it is transferable to other mountain tourism destinations.

2.2.6.2. Italian strategies to prevent global warming and promote de-seasonalization

Italy is in third place in Europe and globally in fifth place in the ranking of favorite holiday countries, with foreigners accounting for 43% of overnight stays and the tourism industry generating around 9% of GDP.

Winter tourism is a relevant part of the tourism supply, but it is expected to suffer from the following impacts:

- higher temperatures, insufficient snow precipitation, lower reliability of snow cover and related shortened length of the skiing season, which will severely impact on winter sport resorts;
- consequent loss of Alpine biodiversity, such as forests and glaciers ecosystems, which are a key touristic attraction;
- additional stress on tourism infrastructure (e.g. resorts, ski lift systems), as risk of hydro-meteorological extremes will induce higher costs for maintenance and risk prevention.

Particularly temperature increase, that will lead to less snow, will impact significantly the winter tourism industry. About half the ski resorts are indeed below 1,300 m, with the location on the south side of the Alps meaning that even the higher-lying areas (e.g. in the Dolomites) will increasingly be suffering from reduced snow reliability. The expected average reduction in income from winter tourism is estimated at about 10.2% in 2030²⁴.

Adaptation strategies of winter tourism

The effects of climate change on Italy are considered manageable thanks to the extensive range of tourist destinations, partly independent of the weather, and the possibility to attract tourists from regions whose climates will be worse affected²⁵. Nonetheless, the depicted situation asks for a differentiation of the tourism offer and seasonal diversification.

For winter tourism, adaptation strategies include technological solutions and the development of new business models:

- the main available technological solutions include developing north facing slopes; extending and improving existing ski areas to higher elevations; developing new slopes, tree planting to protect the slopes and artificial snowmaking.

► Snowmaking is the most common and widespread adaptation strategy (about 77% of the Italian ski areas are already covered by snowmaking systems), but a further rise in average temperature might lead to an increasing need to use artificial snow, inducing pressure on both the costs and the likelihood of conflicts with other water users;

- new business models that can lead to winter revenue diversification include both snow related and non-snow related offers (health tourism, congress tourism, other sports and popular activities, etc).

► Although important, such strategies are however unlikely to fully compensate for the significant reduction in winter tourism expected as a consequence of climate change.

²⁴ Changes in mean winter snow water equivalent (SWE) and the seasonal evolution of snow cover in the European Alps were assessed from an ensemble of regional climate model (RCM) experiments under the IPCC SRES A1B emission scenario. The assessment was carried out for the periods 2020–2049 and 2070–2099, compared with the control period 1971–2000. The strongest relative reduction in winter mean SWE was found below 1,500 m, amounting to 40–80 % by mid-century relative to 1971–2000 and depending upon the model considered. At higher elevations the decrease is less pronounced but still a robust feature. Major impacts for winter tourism in the Alps are therefore expected, as most ski-regions have mean elevations below 2,000 m and are therefore especially vulnerable to climate change.

²⁵ Source: <https://www.climatechangepost.com/italy/tourism/>



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2.2.6.3. *The Mountaineering Villages (Bergsteigerdörfer) initiative*

The Mountaineering Villages (Bergsteigerdörfer²⁶) initiative was established to address the environmentally and socially negative consequences of tourism development on mountains environment. It intends to promote a more sustainable form of Alpine tourism by fostering a sense of responsibility for the natural and cultural heritages of the European Alps. It also aims to contribute to the implementation of the **Alpine Convention**²⁷ at the local level.

The Mountaineering Villages project was started by the Austrian Alpine Association in 2008 and has since developed into an Alpine-wide initiative. As of summer 2021, the network included 35 villages: 22 in Austria, 4 in Germany, 5 in Italy, 2 in Slovenia and 2 in Switzerland. The project covers a total surface of around 3,000 km² and 44,200 inhabitants.

Villages applying to become a Mountaineering Village must adhere to a **set of strict criteria**, including:

- support local culture and traditions;
- provide sustainable tourism options, with a focus on mountain activities;
- actively conserve nature and landscapes, including avoiding big new developments in infrastructure;
- plan new developments to be in harmony with what already exists;
- support local producer in farming, forestry and other sectors;
- encourage the use of public transport and discourage car use through adequate public transport and cycling and walking routes;
- promote exchanges among Mountaineering Villages.

A set of consistent targets has also been established to ensure that the Mountaineering Village designation serves to promote continuous progress towards sustainable tourism. They include:

- the further development of public transport services and infrastructures;
- interconnections between the initiatives for the promotion of local culture organized at the destination;
- the development of specific guidebooks and maps;
- the establishment of “up and running” nature reserve services combining tourism & nature protection.

Two key elements make the initiative unique. It utilizes an approach based on the involvement of and cooperation among actors in the destinations, as well as between the villages included in the network and with the Alpine Convention. It is also a transnational initiative and its success has inspired other communities across the Alps. In 2021, six new villages joined the initiative, including the first two in Switzerland.

The appeal of the title is growing. Interest lies in the recognition of being a pioneer of sustainable tourism and being part of the network of communities. The villages hold annual meetings to exchange experiences and develop new, cross-cutting projects.

One of the biggest challenges is keeping local actors interested and engaged. At the start of the initiative, often only one coordinator (e.g. mayor or tourism representative) led activities at the local level. Since 2013, the responsibility has often been shared among a group of people to ensure continuity of the initiative in the event of retirements or changes of office.

Each village is different in terms of existing infrastructures, economic strength, cultures and approaches to living. However, all the villages share the conviction that tourism development is not strictly related to infrastructure development. They believe an enrichment of tourist facilities and services can also be built on nature-based foundations and cultural specificities, and community buy-in is fundamental.

► The underlining assumption of the Mountaineering Village is that locals should stand behind their village while however agreeing about ambitious sustainable development plans, coupled with rigorous key performance indicators and related targets.

2.2.6.4. *Kyrgyzstan - 'Sustainable Winter Tourism Development Project'*

In order to develop winter tourism, Kyrgyzstan launched a “*Sustainable Winter Tourism Development Project*” for 2021-2025, which is funded by the Government of Switzerland through the State Secretariat for Economic Affairs (SECO). This endorsed CHF 3.5 million for its implementation. The thematic focus is private sector

²⁶ Source: <https://eng.bergsteigerdoerfer.org/>

²⁷ This is an international treaty for the protection and sustainable development of the Alps, signed by the eight Alpine countries (Austria, France, Germany, Italy, Liechtenstein, Monaco, Slovenia and Switzerland) and the European Union.



development, with the project aiming to help improve the business skills of Karakol MSMEs so that to provide quality and safe services along the winter tourism value chain.

The aim is to help developing cross-country skiing, ice skating, snow shoeing and other winter sport activities in Karakol, to be later roll out in other regions²⁸. The resulting increase in competitiveness and diversification is expected to be conducive to inclusive and sustainable economic growth and year-round employment.

Key institutional partners are expected to commit to a favorable business environment and improved coordination mechanisms. This is expected to enhance the framework conditions for MSMEs and foster their inclusion, as well as integrating sustainable practices into year-round activities and involving local communities.

MSMEs in Karakol destination embed good environmental and social practices in line with the Global Sustainable Tourism Council (GSTC) minimum standard into their operations. Capacity building facilitated by the project ensures that sustainability is addressed systematically in the destination along the winter tourism value chain and that these practices become the new normal²⁹.

- ▶ The project expects that selected MSMEs propose new and safe winter tourism products i.e. cross-country skiing and snowshoeing, while encouraging customers to visit a local fair and indulge in culinary offers. Most products offered or linked with activities in four seasons will be accessible to the local population.

2.2.6.5. A new mountain accommodation concept: "Albergo diffuso" (widespread hotel)

Many small towns and villages are reviving their heritage through various forms of innovative tourism, such as Italy's successful model of the Albergo Diffuso³⁰. This is an innovative concept of hospitality, which was launched in the country in the early 1980s. Translated into English as 'scattered hotel', it consists of a hotel that is not in a single block, but is converted out of various historic buildings in a small community.

It can be defined as a **horizontal hotel, located in a village or in a historic center, with rooms and services located in different buildings**, albeit close to each other. It is a unitary accommodation facility, managed in an entrepreneurial form, which addresses a request interested in staying in a prestigious, authentic urban context, in contact with residents, using normal hotel services.



Figure 1: Albergo diffuso at Santo Stefano di Sessanio, Italy

The widespread hotel offer is placed on the tourist market as a type of accommodation offering various pluses:

- *Satisfaction of expert users*: these are people who have the taste to travel, who have spent holidays and stays in different types of hotels and locations, and who are looking for innovative formulas and at the same time able to reflect the characteristics of the place as much as possible;
- *Respect for the cultural environment*: it recovers the artistic and cultural heritage of the smaller centers, and tends to increase the income and employment of small towns, maintaining or increasing the population, without intervening by contaminating the culture, the environment, the identity of the places. It can have the function of cultural and economic "animator" of historic centers, particularly in small town, as its "reception" can also operate as an "information office" of the locality, with the historic center being revitalized while maintaining a complexity of functions, residential, commercial, artisanal;

²⁸ Source: [Switzerland allocated around 320 million soms for sustainable winter tourism in Kyrgyzstan](#)

²⁹ Source: [Sustainable Winter Tourism Development Project, Kyrgyzstan](#)

³⁰ Source: [Albergo Diffuso](#)



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- *Authenticity*: unlike traditional hotels, the widespread hotel allows tourists to experience a stay in houses and buildings designed to be real homes, with structural aspects, such as walls, spaces, fixtures, furnishings and systems other than those designed for "tourists";
- *Articulation of the proposal*: the tourist who goes to the widespread hotel has at his disposal a wide range of choices, all offered by the same hospitality operator. The "widespread hotel" product is in itself differentiated in terms of the different level of comfort of the various housing units, different distance from the center, different architectural characteristics of the buildings and allows a policy of differentiation (including prices) addressing different groups of users;
- *Hotel services*: it guarantees all hotel services, from the restaurant to the common rooms, to the small breakfast that may also be served in the room, along with accommodation, food and ancillary services;
- *Originality-Novelty of the proposal*: a largely original accommodation solution entails greater visibility and offers numerous advantages in terms of positioning strategy in the tourism market;
- *Management style*: it has an original atmosphere, including methods of providing services and connection with the territory. Its unique style reflects both the personality of those who wanted it and the *genius loci*, with regard also to times and rhythms of service, as well as services & products offered;
- *Declination*: it can take on a theme that characterizes their hospitality proposal. There are hotels with a musical, sports, food and wine, cultural theme, etc.

► The "Albergo diffuso" has been a means of reviving small, historic Italian villages and town centers off the usual tourist track. It was recognized by UNWTO and FAO as "a successful model"³¹, suggesting that mountain destinations can aim at sustainable forms of development by promoting "living local" and embedding tourism activities and services in the daily life of their communities.

2.3. The Winter Tourism value chain

2.3.1. The value chain concept

According to the approach recommended by the UNWTO³², 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.

³¹ Source: <https://twitter.com/Albergodiffuso/status/1500389559074447367>

³² UNWTO (2007). *A Practical Guide to Tourism Destination Management*. Madrid



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

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

Figure 2: Components of the tourism product

2.3.2. Primary Activities for Winter Tourism

Primary activities are the core business of public and private tourism actors and involve the packaging, promotion and delivery of the tourism experience³³ to the visitor. They include the followings³³:

- **Product development.** It ensures constant rejuvenation of the destination supply. It includes attractions and activities that provide the major reasons for travelers wanting to visit and experience the destinations and plants such as accommodation, catering and transportation which are mainly developed in support of the Attractions and activities and does not usually act as a primary travel motivator. It is of utmost importance that the attractions and activities are constantly improved and expanded in accordance with new trends and developments in the marketplace.
 - ▶ *Product development should consider lesson learned from the case studies and climate change related risks, trying to differentiate the supply and to introduce business model less based on snow (such as wellness) and transitioning towards the “green season”, so that to reduce the potential negative impact of snow reduction in the winter season.*
- **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.
 - ▶ *Winter tourism in Armenia needs better packaging, particularly at Jermuk and Tsaghkadzor, mixing different sport activities along with culture, nature and wellness.*
- **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.

³³ Are here anticipated some suggestions for the winter tourism product development in Armenia that descend also from considerations raised in chapter 3 “The current situation of winter tourism in Armenia”



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

- **Distribution and sales.** Generic and commercial information should be distributed through the most appropriate channels. These include destination websites, consumer enquiry lines, mailing services, brochure display facilities, retail travel agency networks.

▶ *Trade marketing methods are most low-cost and might be conveniently used for promoting winter tourism packages towards tour companies that have winter tours by implementing a trade marketing plan based on fam trips and press tours.*

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

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

- **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 centers; accommodation, food/catering, tours, attractions and activities, car and car rentals, entertainment, health and beauty services, sport and recreation, etc. Usually there are problems with transportation, with tourists more satisfied with accommodation but complaining with taxis and particularly public transportation, especially at intermodal hubs.

▶ *Armenia winter tourism product development would take advantage by starting prototype programs addressing accessibility problems for tourists with limitations, thus catering to the needs of such increasing market segments. As well, it might consider the promotion of typical mountain accommodation, as well as sustaining the diffusion of widespread of hotels, that can be differentiated according to the characteristics of mountain villages.*

- **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 program.

▶ *There are no National surveys about visitor satisfaction at cultural sites, which might be considered, also through cooperation with TC, regions, destinations, universities.*

2.3.3. Foundation Activities for Winter Tourism

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

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

The 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.

They include:

- **Destination planning and infrastructure.** The physical image, environment integrity and infrastructure of the destination are key determinants of the quality of the visitor's experience. The industry is not be able to function without an appropriate and operational transportation network (e.g.



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public transport, roads, airports) as well as bulk infrastructure (telecommunications, water, electricity, recreation and access to communication channels). The threat of diseases such as COVID 19, etc. puts also pressures on destinations to provide high quality basic infrastructures and services.

▶ *Armenia's cultural sites suffer transportation network problems, with some destinations having problems with bulk infrastructures as well. A prioritization of interventions should be considered according to the site strategic relevance.*

- **Training and skills development.** Tourism is a service industry and the quality of the visitor experience is largely determined by the quality of service and personal interaction experienced at the destination. Therefore, the development of quality interactions with the people tourists encounter at the destination is an important element of the tourism value chain.

▶ *Armenia lacks recognition of winter tourism professions, such as snowshoes guides, skiing instructors, etc. This also reminds to the necessity to enforce capacity building actions at different levels, starting from professional school and University education in sports and tourism.*

- **Technology and systems development.** Technology has become a driving force in support of the tourism value chain. Internet based reservation services have revolutionized the concept of online reservations by providing access to a far greater number of destination product. Operational and management information systems are also of major importance. Augmented reality and virtual reality have also revolutionized the way cultural and natural Attractions and activities are promoted.

▶ *AR/VR is lacking at most Armenia winter sites. It might help tourists to experience the adrenaline of winter tourism, monitor wellness improvements and being a marketing mean of advertisement and adding much value to the tourism visits.*

- **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.

▶ *Implementation of concept policies such as "Albergo diffuso" or "Mountaineering Villages" would help to fully include such activities in the value chain by creating winter tourism clusters in chosen destinations.*



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3. THE CURRENT SITUATION OF WINTER TOURISM IN ARMENIA

3.1. Winter Tourism Supply

3.1.1. Armenia Climate

Usually, the winter in Armenia lasts three months, starting from December until February and it is typical for the first snowfall to take place in early December in the mountains and in the Gegharkunik region.

The temperature in Yerevan in December fluctuates from 6C (42F) to -7C (21F). The snow starts to fall in the capital city, Yerevan, much later than in the mountainous part of the country. The average winter temperature in Armenia's mountainous region fluctuates between -10C (14F) to -20C (-4F).

3.1.2. Key regional areas and winter tourism supply

3.1.2.1. Skiing resorts

One of the most exciting things to do during an Armenian winter is to go skiing. Due to the climate and orography, there are several opportunities for skiing and winter sports in Armenia. Here are a few of our recommended places to ski in Armenia:

- Tsaghkadzor (downhill);
- Jermuk (downhill);
- Akhtamar – Sevan (downhill);
- Ashotsk (cross-country)³⁴.

Tsaghkadzor, located in Kotayk province, is probably the most famous ski resort in Armenia. The town is located at 1,750 m above sea level on the southeast slope of mount Teghenis. It literally means “the gorge of flowers”, and it really has very picturesque gorges in summer, while during winter this mountainous town is attractive for skiing, ice skating, snowboarding, snowmobile driving, etc. It started functioning during the Soviet times since 1967, with the lifts and other sporting facilities built to prepare Soviet athletes for the 1988 Winter Olympics. The town was further developed into a ski resort and later fully modernized with the old lifts being replaced.

► *It is therefore planned according to old-fashioned '60s and '70s integrated approach, which foresaw concentration of tourism accommodation and skiing infrastructures³⁵.*

For professional and amateur skiers there is an armchaired *ropeway*, located on the eastern slope of Mount Teghenis, 1966-2819 meters above sea level. From the maximum height, where the speedy chairlift takes skiiers in 32 minutes, all of Armenia is visible at a glance and if the weather is clear, the tourists may enjoy the breath-taking view of Mount Ararat. Extreme lovers can also take *zip-line* to jump by over amazing views and hills.

- For skiing and snowboarding, there are 30 km of slopes available, with five stations and more than a dozen ski runs and 7 lifts transporting the guests. The winter sports area is situated between the elevations of 1,966 and 2,819 m.

Jermuk, located in the center of the Jermuk Municipality of the Vayots Dzor Province in southern Armenia, was considered one of the popular destinations for medical tourism in the Soviet Union. It is indeed better known for its hot springs and mineral water brands bottled in the town. The name of the town is derived from the Armenian word of "jermuk" (ջերմուկ) or "jermook", in Western Armenian "chermoug", meaning "warm mineral spring".

- For skiing and snowboarding, there are 3 km of slopes available with 1 lift to transport the guests. The elevation difference is 338 m (Base 2100 m - Mountain 2438 m).

Akhtamar – Sevan is located in the Gegharkunik Province.

³⁴ Source: [14 Fun and Festive Things to Do in Armenia in Winter](#)

³⁵ Lozato-Giotart, J.P., 1993. Geography of tourism. *Geography of tourism* (Ed. 4).



- For skiing and snowboarding, there are 2.5 km of slopes available. 1 lift transports the guests. The winter sports area is situated between the elevations of 1,900 and 2,249 m.

The website skiresort.info provides us with an evaluation (one to five stars) of existing facilities at each resort³⁶.

Location	Evaluation Criteria		
	Ski resort size	Slope offering, variety of runs	Lift and cable car
Tsaghkadzor	***	***	***
Jermuk	*	*	***
Akhtamar – Sevan	*	*	***

Table 2: Evaluation of Armenia Ski Resorts

Ashotsk, which is probably the coldest place in Armenia, is still in its early development stages. The village is located approximately one hour away from the historic city of Gyumri in the Shirak region and the nature in Ashotsk is barren and without trees.

- ▶ As Ashotsk is also not too rocky, it makes a good place to do **cross-country skiing or other winter sports**³⁷.

3.1.2.2. New project in winter tourism: Myler Mountain Resort

Myler Mountain Resort founder Tigran Harutyunyan initiated planning for a ski resort in 2017-2018. At first, Maymekh Mountain was selected as the future ski resort. Then, a master plan was developed by the world leading mountain ski resort planning company – Ecosign. Maymekh was planned to be a top-notch, the largest in Armenia, and positioned on the regional peer map. It aimed to increase tourist flow to Armenia and develop a winter tourism segment in Armenia, contributing to local and regional developments. The proposed Maymekh Mountain Resort was located 10 kilometers west of the City of Vanadzor, the capital of Lori Province, a population of approximately 86,000. The project envisioned 15 lifts, with the ability to take 17,500 skiers at one time.

After some consideration and some pause, alongside Ecosign, they initiated ‘Golden Analysis Study’ to find the best mountain of Armenia suitable for skiing.” First, the entire 29,743 sq.km area of Armenia was studied using “Planet Observer -Planet DEM 30 Plus satellite mapping” to identify areas that appeared to meet basic elevation, exposure, and climatic characteristics suitable for the development of ski resorts. Following the ‘desk research, the team and Ecosign colleagues flew over the top 5 Armenian mountains to study the condition suitable for skiing. Finally, after reviewing geological, weather, and solar data – Yeghipatrush was selected as the best mountain for skiing³⁸.

For the initial phase with an investment of more than 60 million euros will be completed in the winter of 2023, and it is planned to complete the whole project in 2032-2035. It is planned to invest 250-300 million euros over the course of 10 years. From 60 million euros 34 million will be invested only for the construction of ropeways, the rest to the creation of other infrastructures, artificial snowmaking systems and ski tracks. As a result, they will be ready to accept about 6,000 skiers at a time, which is currently three times the number of visitors in the high season in Armenia. By the way, they will not focus only on winter recreation and entertainment, they will provide and offer activities relevant to all seasons.

In the first phase, 250 employees will be involved in the construction work, mostly from the community, and the professional staff entirely consists of specialists with international qualifications. About 1500 permanent jobs will be created upon completion of the project³⁹.

Some data about the project:

Ski Area

- Total of 16 major lifts including 1 Ten passenger two-section gondola, 9 high speed detachable chairlifts, and 5 fixed-grip quad chairs, plus a surface beginner platter lift and four conveyor surface beginner lifts. Total capacity of 41,400 people per hour, capable of comfortably supporting 17,000 skiers at one time.

³⁶ Source: <https://www.skiresort.info/ski-resort>

³⁷ Source: <https://absolutearmenia.com/skiing-in-armenia-ashotsk-ski-centre/>

³⁸ Myler Background Information (Maymekh), <http://myler.am/myler-background-information-maymekh/>

³⁹ “Myler” Aspires To Become A Regional Center For Skiing: Tigran Harutyunyan, <http://myler.am/myler-aspires-to-become-a-regional-center-for-skiing-tigran-harutyunyan/>



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- A total of 100 marked ski pistes of all ability levels totaling 92 km of length and 334 hectares of groomed ski terrain, with additional off-piste free riding.
- A skiable vertical drop of 972 meters between 2850 and 1878 meters elevation.

Resort Base Area

- Total of 13,436 units and 72,238 pillows planned at buildout and will be comprised of Hotels and Residences, Managed Condos and Holiday Apartments, Multi-Family Townhomes, Single-Family Chalets, Pensions and Bed and Breakfast, Resident Infill Housing and Employee Housing.
- During peak periods, it is estimated over 35,000 guests from overnight accommodation which could generate 12,000 skiers.
- A total of over 4,000 parking stalls are planned for day use guests and commercial parking. It is estimated that over 14,500 guests will come from car and bus parking and could generate over 8,700 skiers from buses/ parking during period periods.
- The resort village, real estate and parking has the potential to supply over 20,000 skiers which is higher than the buildout skier carrying capacity of 17,000.

Resort Villages

- The resort will have three villages; main Ski Village, Boutique Alpine Village and the Lakefront and Golf Village.
- Main ski village has 1,704 units of overnight accommodation, 6,462 pillows
- Main ski village proposes a total Gross Floor Area of 175,000 sq.m, contains a total of 30,000 sq.m of commercial and skier service floorspace and 145,000 sq.m of gross accommodation space.
- The Boutique Alpine Village proposes 1,485 units and 6,980 pillows of overnight accommodation. It has a total gross floor area of 166,450 sq.m of which 21,000 sq.m will be commercial and skier services and 145,000 sq.m of overnight accommodation space.
- The Golf and Lakefront Village proposes a total of 950 units and 3,350 pillows of overnight accommodation⁴⁰.

3.1.2.3. Hot Springs

Like many other mountainous nations, Armenia is rich in mineral and thermal hot springs that tourists can visit and enjoy throughout the country during winter⁴¹:

- Jermuk Hot Springs and Geysir
- Tatev Thermal Springs
- Arzakan Hot Springs (Aghveran)
- Hankavan Thermal Springs
- Spitaklich Thermal Spring (Ararat).

The most reknown is **Jermuk Hot Springs and Geysir**. Meaning “warm” or “hot” and located in the south of Armenia, Jermuk is a resort town mainly known for its healing mineral hot water springs and mineral bottled water⁴². The thermal spring temperature is averaging 30 up to 60 Degree Celsius and SPA sanatoriums are available all year round. The town is located in the depth of Vayots Dzor province which is rocky and full of mountains. It also has beautiful waterfalls the most famous of which is 70 meters high Jermuk waterfall or “Mermaid’s hair”.

The town is home to various resorts and sanatoriums, including Grand Resort Jermuk, Gladzor Sanatorium, Olympia Sanatorium, Jermuk Armenia Health Spa, Ararat Health Spa, Jermuk Moscow Health Resort, Jermuk Ashkharh Health Center, and Jermuk Resort & Spa. In recent years *Snowman festival* was organized a couple of time in winter in Jermuk, during which locals from different regions as well as tourists make snowmen or other figures out of the snow.

► *As already said, it was a popular destination already in the Soviet Union, and is being redeveloped to become a **modern center of tourism and health services**.*

⁴⁰ <http://myler.am/about/>

⁴¹ Source: <https://www.exittoarmenia.com/2018/03/top-5-best-natural-hot-springs-in.html>

⁴² According to a legend in ancient times there was a deer shot by the hunters and when the hurt deer was passing through the hot springs he was immediately healed. Since the deer is a symbol of Jermuk town.



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► *In 2022, September 13 Azerbaijan began shooting on Jermuk and the life of the city changed. The sanatoriums stopped functioning. One month later, in October they began functioning again, but tourists may think that visiting Jermuk is not too safe now and the image of the destination must be restored.*

Besides Jermuk, there are also other resorts which have hot springs and other resort resources. Currently there are 20 licensed sanatoriums, the list of which is presented at Annex 1, and health and winter tourism may be developed taking into account health resorts and their resources as well.

3.1.2.4. Yerevan in winter

Yerevan, the Armenian capital, owns resources that can be deployed in winter time as well as other seasons. Particularly during winter holidays, Yerevan is filled by the atmosphere of New Year and Christmas fairy-tale⁴³ and can be visited through several winter tours organized by tour agencies⁴⁴.

In the city centre there is a *Christmas market* full of handmade souvenirs, New Year and Christmas tree decorations, different gifts and many other things to see and try. Apart from it, the municipality organizes different *concerts* and *festivals* on the streets of Yerevan in the frames of New Year and Christmas celebrations. For tourists who travel with children there is a *Winter Park* for winter activities, *skate rinks* and different thematic concerts. Visitors can also participate in *The Santa Marathon*. It is an annual charity marathon during which they dress up in Santa costume and run or just walk along the streets of Yerevan with hundreds of other Santas. The participants get hot coffee or tea and have fun in the frames of marathon.

► *As other capitals worldwide, Yerevan can aspire to play a role in the short-break tourist market, with a special allure in winter due to its peculiar atmosphere.*

3.1.2.5. Ice skating

A further winter activity is ice skating. Such activity can be practiced in Yerevan at the following sites⁴⁵:

- *Yerevan Winter Park*, which is the biggest open-air ice rink in Armenia (1800m²), which includes cafes, a restaurant, zipline, rifle range and other entertainment pavilions⁴⁶
- *Swan Lake*, which is an artificial lake near the Opera and Ballet Theatre;
- *Karen Demirchyan Sports and Concerts Complex*, which is the biggest closed rink.

► *Such attractors do not clearly represent a primary attractor for visiting Armenia, but add experiential activities for local and tourists dwelling in Yerevan, particularly in winter.*

3.1.2.6. Hot air balloon

Main balloon flights are organized in Garni, one of the oldest villages in Armenia. Tourists are here offered a view on the village of Garni, the Khosrov national reserve, the ruins of the Havuts Tar Monastery and the picturesque Garni gorge, with the jewel being the Garni Temple, which is a masterpiece of pre-Christian Armenian architecture⁴⁷. Hot-air balloon flight and Garni Temple visit is here offered by private tour companies⁴⁸.

► *Due to its functioning, which is based on temperature gap between internal gas and external atmosphere, hot air balloon is an activity which **can be enjoyed at its best in winter time and can be branded-related to Garni visits**, as it happens in other famous tourist destinations (e.g. Cappadocia in Turkey).*

3.1.2.7. Champions League of Yukigassen

Yukigassen is a game between two teams with seven players each, which is played on a court with certain measurements, with the winner determined through rules made by the Japan Yukigassen Federation. Armenia supported the development of Yukigassen to become a widespread winter sport, with the first competition held in February 2019, in Aparan city. In 2020, 20 teams from 8 countries across the globe competed in Armenia-Champions League⁴⁹.

⁴³ Source: Top Winter Activities in Armenia. Op. cit.

⁴⁴ Source: [Winter tours in Armenia](#).

⁴⁵ Source: <https://armeniadiscovery.com/en/articles/the-skating-rinks-of-yerevan>

⁴⁶ Source: <https://www.winterpark.am/>

⁴⁷ The Temple was built in 77 BC by King Trdat I Arshakuni and is the only pagan temple that has survived to this day in all of the countries in the region.

⁴⁸ See, for instance, <https://www.outdoortrip.com/hot-air-balloon-flight-and-garni-temple-visit>

⁴⁹ Source: [Yukigassen Federation of Armenia](#)



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3.1.2.8. *Winter tourism in Lake Arpi National Park*

Lake Arpi National Park is one of four protected national parks of Armenia. It occupies an area of 250 km², in the northwestern Shirak Province. It is known for great opportunities for bird watching, hiking, horseback riding, cross country skiing, snow-shoeing, and a growing potential for mountain biking, as well as possibilities of canoeing⁵⁰.

▶ *Lake Arpi National Park is however an undervalued spots for winter sports, as it offers about 6-7 months of snow a year, which would make it a very attractive destination for ski tourism, especially considering the with worldwide tendency of reduced snowfalls year by year, due to global warming, which is weakening the performance of competing destinations.*

3.1.2.9. *Winter gastronomy*

A final winter attraction is made by Armenia gastronomy. Armenian cuisine is indeed very rich and variable and during winter holidays in Armenia tourists can taste *tolma*, *harisa*, *ghapama*, *khashlama*, etc. One of the most known dishes which is eaten during colder period of time in Armenia is *khash*. When having *khash* Armenians gather with their relatives and friends around a big table, and Armenian men like to drink a glass of vodka with *khash*. *Khash* is a serious ritual for Armenians and another reason to meet friends and relatives in a warm atmosphere⁵¹.

▶ *Armenia winter gastronomy can represent a key complement to the promotion of other winter tourism products.*

3.1.3. Relevant current experiences

Good practices include Ashotsk Ski Centre by Miqayelyan Family, Lernanist ski trail, Mets Sepasar Tourism Centre, Tsaghkadzor ropeway. Other good practices are Winter in Aparan, Shirak, Lori festivals.

Hereafter such experiences are presented and main issues highlighted.

3.1.3.1. *Ashotsk Ski Centre and the Miqayelyan Family*⁵²

Deservedly the coldest place in Armenia, and also known as the “Armenian Siberia”, **Ashotsk** village is located approximately one hour away from the historic and beautiful city of Gyumri in the Shirak region.

The temperature here can drop to -30C, hence winning the title of being the coldest place in the country. While it is known for its low temperatures, it is also renowned for its unique nature, which is barren and without trees. As the land is also not too rocky, it makes for a fine place to do cross-country skiing or other winter sports.

Here there is a ski centre, whose idea belongs to the Miqayelyan family, a family of athletes and professional skiers that have been living in and skiing around the Ashotsk mountains for generations. At the beginning of 2019 and with the help of an EU-funded project, the Ashotsk Ski Centre was created with the mission to be a skiing school for kids and adults and also help promote winter tourism in the region.

While the Miqayelyans want to increase interest in skiing in Armenia, they are not keen to turn Ashotsk into a commercialized ski hub and resort area. Part of Ashotsk’s appeal is indeed its rawness and they wish to attract those willing to learn and put effort into the sport as well as those who are experienced and looking for a new destination to embark on.

In the future, **the Miqayelyan family wishes to receive funding from the government or from private investors in order to build a cable and lift area since the scenery is treeless and pretty ideal for such a setup**. It also has plans to build cottages around the Ashotsk Ski Centre where guests can come from near or far and stay on-site. Currently, the Ski Centre can accommodate approximately 20 people in private rooms and dorms that they have located there, with the Miqayelyan family planning to increase such supply. Tourists

⁵⁰ Sustainable Ecotourism Development Plan for Lake Arpi National Park, Armenia, Assessment, Strategy and Action Plan, (authors Vahagn Vardumyan, Oscar Alvarado), 2019, P. 11, 30

⁵¹ The name of this dish comes from the word “khashel” which means “to boil”. *Khash* is a soup of boiled cow parts. It is being boiled for several hours until the soup becomes clammy. The dish is served hot with garlic and dry lavash (famous Armenian bread which can be of two types- dry and soft) which is being crumbled into the dish. There is a funny thing that most Armenians crumble dry lavash into *khash* and eat it without a spoon with soft lavash. They call this way of eating “*tiqya*”. It is preferable to have *khash* in the morning as the dish is not digested easily. Source: Top Winter Activities in Armenia. Op. cit.

⁵² Source: [Ashotsk Ski Centre – an Epic Place for Skiing in Armenia and More](#).



spend about 13,000 AMD (\$27-\$30) a day to get accommodation, three meals a day, and equipment included in the price.

Since the village is really remote, the Miqayelyan family is looking for better ways to transport those interested in getting to the Ski Centre. Currently, the village is poorly connected with Yerevan. There is one minibus leaving the Kilikia bus station to Ashotsk daily. The bus number is 378 and the journey takes about 3 hours. For now, the best way is via a rental car or head there with a taxi.

Based on our own observations and interviews⁵³ with them, the following issues were found:

- They work from December till March and mainly organize skiing tours. They also organized competitions and have guests from Serbia, Switzerland, Lebanon and other countries. Last year 2000 tourists visited the resort (both international and domestic).
- Now they may accommodate 10-12 people only and wish to extend capacity. More broadly, they need finance for further development, which includes infrastructures, accommodation, goods and materials. Also, they want to construct a T-bar (600-700 meters). For all of this they need approximately half million dollars.
- They have a plan to create Ski sports and winter tourism academy, which will prepare and train ski instructors, guides and specialists. Now they look for financing to accomplish this project.
- Next year they plan to organize summer camps as well.
- They think that Georgian market is a good source for them and in future they plan to attract more Georgians.
- They feel they are weak with marketing, therefore this year they plan to increase marketing activities.

3.1.3.2. Winter tourism in Lernanist

Lernanist village was founded in 1828. Previously it was called Upper Achta, and in 1978 it was renamed as such. It is the largest rural community in Hrazdan region, with a population of 3,218. The community has 663 farms. It is located 45 km from Yerevan and 7 km from Hrazdan. The Lernanist community is a high mountainous area; snow is heavy during winter months and snow covers stays for more than 4 months.

There are declivous slopes which contributed to the development of skiing and other winter sports. In 2017 for the development of winter tourism in the village of Lernanist a ski trail and a 350-meter ropeway were built with private investments. In the neighbouring territory there is an appropriate sports equipment supply point, as well as a public catering facility. In the future it is planned to build a guest house and other facilities⁵⁴.

Based on our own observations and interviews⁵⁵ with Lernanist Tourism information Center, the following issues were found:

- The Tourism information Center works from December till March, offer skiing, snowboard activities. Nearly 10000 tourists visit there every year (both incoming and domestic).
- It still does not offer summer sport activities.
- In Lernanist there is currently a need to develop infrastructures. There are no big hotel and catering facilities (there is only a little guest house in the near village and a little catering facility).
- In 2020 first quarter, the Centre presented a development project which required 500 ml Armenian drams. It was intended to build new buildings: service infrastructures, new bugle, parking area, first-aid point. However, the Covid-19 pandemic came, and they still cannot find the required funding.
- After finding funding for the investment, it will also engage in new marketing activities.
- At the moment there are no problems with tourists' demand, as their services are well demanded. However, in case of developing infrastructures, it plans to provide better and more services.

3.1.3.3. Guest House in Mets Sepasar community (Mets Sepasar Tourism Centre)⁵⁶

The Mets Sepasar Tourism Centre, which is located in Mets Sepasar community (23 km away from the Lake Arpi National Park Headquarters) was established as a Community Managed Tourism Centre but is yet managed by one family only. It has a kitchenette, 1 mixed bathroom and toilet, 3 rooms with 2 single beds in each, a spacey conference room with a sofa and 2 armchairs.

The centre can accommodate max 6 people with full comfort, (or 7 people with an additional lounge) or up-to 12-15 people in warmer season with visitors who choose the option of sleeping on the floor with mattresses and sleeping bags. This can apply to large groups of relatively younger visitors who have comparatively less

⁵³ The interview was done on September 15, 2022, with the representative of Ashotsk Sky center, by phone.

⁵⁴ Source: Lernanist. [New Winter Tourism Center in Armenia](#)

⁵⁵ The interview was done on September 15, 2022, with the representative of Lernanist tourism information center, by phone.

⁵⁶ Sustainable Ecotourism Development Plan for Lake Arpi National Park. Op. cit.



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demands for overnight stay. Good variety of tourism equipment and tools, such as skis (30), ski-shoes, skiing poles, bicycles (3) and biking helmets, sleeping bags (3), sleeping mattresses (3), binoculars (2) are available at the Centre. The family operating the centre offers free breakfast included in the price of the stay and lunch and dinner on demand for an additional charge (e.g. home cooked food).

By the beginning of 2019 the Centre offered the following services: hiking, trekking, horseback riding, mountain biking, ski-touring, rural gastronomic experiences, but the family operating the Centre is willing to expand the offers to historical-cultural visits, snow-shoeing, animal watching, birdwatching, educational activities, etc.

3.1.3.4. Ropeway of Tsaghkadzor

We already mentioned Tsaghkadzor, for being a famous international center of tourism and skiing. After the Soviet times, in 2004 the Italian "Leitner" company replaced the former ropeway with a new, modern one – the *Ropeway Tsakhkadzor*⁵⁷. For the reconstruction, by decision of the Armenian government dated April 22, 2004, the first, second and third parking areas of the ropeway were separated from the assets of CJSC Tsaghkadzor Main Sports Complex and handed over to the State Committee on Physical Culture and Sports of the Republic of Armenia, which, in turn, donated property on behalf of the State to the association of legal entities National Olympic Committee "(NOCA) with the condition that the NOCA or through the commercial organizations created by it would have, by December 31, 2005, restored and started the operation of the ropeway. After that the ropeway was given to a private company "Lernatur" for trust management.

According to estimates of the Prosecutor General's office of the RA, **there was a damage caused to the State by the company in 2008-2016, which amounts to 1 billion 985 million 273 thousand drams**. In addition, according to the signed agreement on trust management of the ropeway, the net profit of NOCA is 50 percent of the net profit derived from the operation of the ropeway, and the remaining 50 percent of the profit goes to the management organization. According to the results of the investigations, the RA Prosecutor General's Office has initiated a criminal case on p. 2 art. 205 (evasion from taxes, duties or other mandatory payments, in a large amount), on p. 1 p. 2 art. 184 (Infliction of damage to property by deception or abuse of confidence, which inflicted particularly great damage) of the RA Criminal Code⁵⁸.

According to the owner of the ropeway, in 2019, the cable car presented itself to tourists in a new way, because the ropes were completely changed, a night skiing track was built, fully illuminated, the latest equipment was acquired⁵⁹.

According to an interview⁶⁰ with Tsaghkadzor Community's local government bodies, the ropeway is old, it needs more investment, improvement of ropeway in order to be faster. According to them, there are many hotel and catering facilities, but year by year the number of visitors is decreasing as the ropeway is old.

Besides, an interview was conducted with National Olympic Committee representative Hrachya Rostomyan, who is responsible for the ropeway of Tsaghkadzor⁶¹. According to interview results:

- *Every year technical renovation works are done for the ropeway, which make it more safe and secure, and then fast;*
- *Last year the parking area was tripled making 5000 meters;*
- *They are constructing a new 4 stars hotel in the area of ropeway, with its catering points;*
- *Every year the cafes of the area are being renovated;*
- *Last year the toilets of the area were reconstructed;*
- *This year the ropeway plans to organize ticket sells together with Tsaghkadzor information centre so as to reduce the queues;*
- *They are currently constructing a new and modern centre of sports equipment which will be sold to visitors and also given for a rent;*
- *During last 2 years many investments were done in the above-mentioned projects, totalizing over 10 million dollars;*
- *The slow work at the ropeway is due to local climatic conditions, as during winds the work slows. That is why now they are planning to construct a new ropeway (planned to be open in 2026), with closed cabins, which will carry 12-16 people;*
- *Currently they are constructing the second ropeway which will connect Hatis mountain, where the 33-meter-tall statue of Jesus Christ should be constructed in future years⁶².*

⁵⁷ Source: <https://ropeway.am/index-en.php>

⁵⁸ As a result of non-payment of taxes during the operation of the ropeway Tsakhkadzor, the State has been damaged in the amount of 476 million drams. A criminal case has been initiated, <https://www.prosecutor.am/en/mn/7433/>

⁵⁹ Source: <https://blognews.am/arm/news/606971/haok-glkhavor-qartuxar-hrachya-rostomyani-andradardzy-kotayqi-marzpet-romanos-petrosyani-arats-haytarutyany.html>

⁶⁰ The interview was done on September 16, 2022, with the head of Tsaghkadzor Community, by phone.

⁶¹ The interview was done on October 13, 2022, with National Olympic Committee representative Hrachya Rostomyan, by phone.

⁶² Source: [Jesus Christ Statue: Construction Continues on Armenia's Mt. Hatis](#)



3.1.3.5. Winter festivals

Some winter festivals were organized in recent years. For example, in 2022 February, the “Winter in Aparan” festival was organized by the Municipality of Aparan. The festival was held at Kachasar area at 2050-2200m height on the Aparan-Lusagyugh road, which is approximately two kilometers away from the city. On this event, competitive and amateur tournaments were held in skiing, alpine skiing, arm wrestling, weightlifting, tug-of-war, sledding, rafting, shooting and other sports⁶³.

In February 2022, “Shirak winter -2022” was organized in Mets Sarian village⁶⁴. Such festival was also organized in Lori⁶⁵.

3.2. Winter Tourism Demand

3.2.1. International demand

According to Statistical Committee of the RA incoming tourist visits to Armenia by quarters are as follows (table 3)⁶⁶.

For winter tourism we may consider Q1 (Jan, Feb, March) and Q4 (Oct, Nov, Dec). However, the statistics is very broad, as there are no detailed information of incoming tourist stays by regions, their profile (age, gender), also by main purpose of visit. Since 2021 there is a new electronic border management system which provides statistics by countries of residence, age and gender, but general - for all tourists, and not for regions or by hotel facilities, etc⁶⁷.

► *Due to such weakness in statistics collections, at the moment it is not possible to know the exact figures about how many international tourists visited winter tourism destinations in Armenia, what kind of services they prefer, their age, gender, length of stay, etc.*

Year	2018 Q 1	2018 Q 2	2018 Q 3	2018 Q 4	2019 Q 1	2019 Q 2	2019 Q 3	2019 Q 4	2020 Q 1	2020 Q 2
No. incoming tourists to the RA	346,458	339,521	589,230	376,573	364,489	405,566	689,097	435,225	307,590	-
	2020 Q 3	2020 Q 4	2021 Q 1	2021 Q 2	2021 Q 3	2021 Q 4	2022 Q 1	2022 Q 2	2022 Q 3	2022 Q 4
	16,471	36,277	86,524	152,739	370,12	260,533	249,361	339,370	648,762	429,852

Table 3: Number of incoming tourists to the RA by quarters, 2018-2022

3.2.2. Domestic demand

The Statistical Committee of the RA provides the number of domestic tourists by quarters based on data provided by hotel facilities.

Here again, for winter tourism we may consider Q1 (Jan, Feb, March) and Q4 (Oct, Nov, Dec)⁶⁸.

Year	2018				2019				2020				2021			2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
No. domestic tourists	111888	46868	805900	127666	158672	76784	1169942	139202	139,619	539	794,823	110,775	150,272	65,858	1,218,981	160,715	183,334	95,644	1,417,074

Table 4: Number of domestic tourists of the RA by quarters, 2018-2022, people

► *As for international tourists, the data are general; there are no detailed information by regions and destinations, by the age, gender, purpose of travel, and other characteristics of domestic tourists. Some information about the number of winter tourists is presented in 3.1.3.1 and 3.1.3.2.*

⁶³ Participating in “Winter in Aparan”, https://aspu.am/en/content/participating_in_winter_in_aparan/#sthash.JLp1zGPj.dpbs

⁶⁴ <https://www.shantnews.am/news/view/1081179.html>

⁶⁵ <https://www.armtimes.com/hy/article/180490>

⁶⁶ Quarterly reports about the socio-economic situation in the RA for 2018-2022, <https://www.armstat.am>

⁶⁷ Source: [The socio-economic situation in the RA 2021 January-December. TC FB page](#)

⁶⁸ Source: [Quarterly reports about the socio-economic situation in the RA for 2020-2022](#)



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3.3. Key Stakeholders

3.3.1. The role of government

Now the Ministry of Education, Science, Culture and Sports of the RA is responsible for developing state policy in the sphere of sports. Before there was the Ministry of Sports and Youth Affairs of the Government of Armenia. The ministry has a Department for Sports policy⁶⁹.

In 2017 the Ministry of Sports and Youth Affairs of the RA draft of the program "*Sports Tourism Development Concept*" (for 2018-2022), which was put up for discussion on the unified website for the publication of draft legal acts, but it has not been adopted until now⁷⁰.

Before that, the following state programs were adopted:

- "*Tsaghkadzor as a tourism center meeting international standards*" target problem solving program approved by the protocol decision N 948-N of the Government session of June 9, 2005⁷¹.
- "*Jermuk city development strategy for 2009-2012*" approved by the protocol decision N 29-N of the Government session of July 16, 2009⁷².

▶ *As such programs appear dated it may be considered to update them while adopting new strategies for the development of other key sites above mentioned, such as Ashotsk and Lernanist.*

3.3.2. Private actors

Today, the private sector is engaged in the implementation of winter tourism as investor in resorts above mentioned (Ashotsk Ski Centre and the Miqayelyan Family, Lernanist, Mets Sepasar Tourism Centre, Tsaghkadzor) and as tour providers. According to official data, more than 90 companies in RA carry out sports tours, catering to both individual tourists and groups⁷³ and there are several winter tours in Armenia offered by tour companies⁷⁴.

▶ *Building on international expertise, it should be considered to foster public-private partnership (PPP) for winter infrastructure development and management, whilst involving tour companies in destination promotion, eventually through cooperation with local DMOs.*

3.3.3. NGOs

There are some organizations in the sphere:

- *Armenian Ski Federation*, which was founded in 1992⁷⁵.
- *Armenian ski mountaineer's association*, which was established in 2016, although it has been working as a club for more than 10 years. It seeks to promote and ensure a large influx of people into the mountains of Armenia following the mission to gather ski lovers, professionals and experts around it to find ways to improve this type of sport in Armenia. The founding member of the Association is Hovhannes Martirosyan. The Armenian ski mountaineers' association is a unique, skillful association, which successfully participated in different state projects implemented by the Tourism Committee of the Republic of Armenia. The implemented projects concern the development of the ski touring in Armenia and among them is GPS trails development⁷⁶.
- *The Armenian Mountaineering and Mountain Tourism Federation*, which has been operating since February, 2011. The goal of the federation is to promote mountaineering, mountain tourism and the forming of culture of climbing. In order to make every effort for reviving the mountaineering in Armenia, trainings, seminars, discussions, meetings with Armenian mountaineers living outside of Armenia, as well as with foreign mountaineers are organized and conducted. An exchange of experience has taken

⁶⁹ Source: Ministry of Education, Science, Culture and Sports of the RA, URL: <https://escs.am/en/static/structura>

⁷⁰ Source: Draft protocol decision of the Government of the Republic of Armenia "On approving the concept of development of sports tourism", <https://www.e-draft.am/projects/554/justification>

⁷¹ Source: "[Tsaghkadzor as a tourism center meeting international standards](#)" target problem solving program approved by the protocol decision N 948-N of the Government session of June 9, 2005.

⁷² Source: "[Jermuk city development strategy for 2009-2012](#)" approved by the protocol decision N 29-N of the Government session of July 16, 2009

⁷³ Source: Draft protocol decision of the Government of the Republic of Armenia. Op. cit.

⁷⁴ Source: Winter tours in Armenia, <https://onewaytour.com/categories/winter-tours/> and https://barevarmenia.com/en/armenia_tours/activities/

⁷⁵ Source: https://www.facebook.com/Armenian-Ski-Federation-178213345690157/about/?ref=page_internal

⁷⁶ Source: <http://www.armski.am/>



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place by these meetings, which brought to the improvement of mountaineering skills and knowledge. Groups of 5-7 people pass the mountaineering theoretical and practical training program twice a year, and year by year the federation's ranks are filled with experienced mountaineers who have a great role for developing the climbing in Armenia⁷⁷.

During an interview⁷⁸ with them, they mentioned the following problems of winter tourism development:

- ✓ Scarcity of infrastructure in mountainous areas;
 - ✓ Lack of winter tourism safety concept by Ministry of Emergency Situations;
 - ✓ The problem of professional education of winter tourism sector representatives;
 - ✓ The issue of licensing winter tourism sector representatives.
- *Yukigassen Federation of Armenia*, which was launched to support the Armenian sports environment and its development paving a way for yukigassen to become a widespread winter sport in Armenia⁷⁹.

3.4. Challenges for tourism in mountain areas and emerging issues

3.4.1. Environmental impacts

The lack of reliable tourism data and indicators in most mountain destinations worldwide significantly challenges the monitoring and evaluation of the positive and negative impacts of tourism activities, especially in developing countries. Mountain ecosystems include a wide range of small and unique habitats, with sometimes very short growing and breeding seasons for fauna and flora, and can be particularly sensitive to alterations produced by human activity. Mountain landscapes can change abruptly for a variety of reasons: avalanches, landslides, earthquakes, floods, rockfalls, deforestation, lava flows and drought. Tourism activities often involve the development and intensive use of trails, as well as sports tracks made by vehicles, loss of landscape due to the construction of tourist facilities (sometimes illegal), and motorized and nonmotorized transport. Generally, the presence of visitors is concentrated in small areas, contributing to increased noise pollution and waste production. The practice of mountain sports, involving both athletes and pack animals, invades natural spaces, meadows and marshes, causing serious environmental problems associated with water pollution, the accumulation of waste, soil compaction in camping areas and the impact on fauna, often with severe repercussions for fragile and sensitive ecosystems⁸⁰. For example, studies in both the Himalayas and the Andes show the effects of tents and improvised tourist toilets on water sources and the soil⁸¹.

Other environmental impacts of tourism may include land clearance, wildlife relocation and the introduction of exotic and invasive species and diseases. Winter tourism, ski resorts and destinations with artificial snow have the highest impact on mountain environments. In particular, such activities can lead to:

- an impact on the landscape due to ski runs, ski-lifts and construction works for snowmaking;
- large consumption of water;
- massive and increasing energy consumption;
- increased soil erosion (additional flow of surface runoff in spring);
- disturbance of fauna and damage to flora;
- traffic congestion; and
- indirect damage related to construction works and services for tourists, as well as building speculation, for example, the construction of second homes.

3.4.2. Climate change

According to research by UNWTO and the International Transport Forum (ITF) released in December 2019, the tourism sector is predicted to increase its CO₂ emissions by at least 25 percent by 2030 (UNWTO and ITF, 2019). While the COVID-19 pandemic has led to a 7 percent reduction of greenhouse gas (GHG) emissions globally, it is expected that emissions from tourism could rapidly rebound as operations restart, so the need to align tourism operations with climate action continues to be of the utmost importance if the sector is to respect international goals (UNWTO, 2021). Due to global warming, mountain ranges such as the

⁷⁷ Source: [The Armenian Mountaineering and Mountain Tourism Federation](#)

⁷⁸ The interview was done on September 23, 2022, by phone and email, with the representative of the Federation.

⁷⁹ Source: https://yukigassen.am/?fbclid=IwAR0Xng6Xg489ZbAw7ab3NjByq_AA3ujEnKnuyaKnCFw-KkELKl0it1EomSo#linkToThird

⁸⁰ Barros, A., Monz, C. and Pickering, C., 2015. Is tourism damaging ecosystems in the Andes? Current knowledge and an agenda for future research. *Ambio*, 44(2), pp.82-98.

⁸¹ Hock, R., Rasul, G., Adler, C., Cáceres, B., Gruber, S., Hirabayashi, Y., Jackson, M., Kääh, A., Kang, S., Kutuzov, S. and Milner, A., 2019. High mountain areas.



Himalayas, Alps, Rocky Mountains and southern Andes, and isolated peaks such as Kilimanjaro in Africa, are showing signs of severe glacial loss.

According to UNWTO, UNEP and the World Meteorological Organization (WMO), the impacts of climate change that will affect the sustainability, competitiveness and development of tourism destinations include:

- Changes in the length and quality of climate-dependent tourism seasons can have significant implications for competitiveness between destinations.
- Climate-related environmental changes (water availability, loss of biodiversity, landscape degradation), increased natural hazards, infrastructure damage, and increased incidence of vector-borne diseases will impact tourism to varying degrees. Climate change is likely to trigger the rates and intensity of natural hazards such as landslides, avalanches, flooding, and river discharge, with dramatic consequences for tourist destinations.
- Climate change mitigation policies aimed at reducing GHG emissions may impact tourism mobility, leading to increased transport costs, and encourage changes in the travel patterns of tourists.
- Climate change-related economic and political instability is expected to intensify in some countries, leading to changes in travel choices of tourists, particularly international visitors.

In Nepal, the Government and the Action on Climate Today team jointly conducted an economic impact assessment of climate change on tourism. The assessment revealed that the economic cost of loss and damage in the sector was equivalent to an annual average of 2–3 percent of total gross domestic product between 1971 and 2015. With increasing impacts, this loss and damage will be even more significant.

3.5. SWOT analysis⁸²

3.5.1. Strengths

- Availability of natural resources
- Mountainous Armenia, with skiing resorts already established in Tsakhadzor, Ashotsk, Lernanist, Jermuk, etc.
- Availability of numerous hot springs
- Availability of side attractions and resources that complement main winter tourism products (skating places, tasty national cuisine to try in winter, Christmas and New Year celebrations)
- Supply of winter tours by local and international agents

3.5.2. Weaknesses

- Absence of security norms and professional standards for winter sports (winter tourism safety concept by the Ministry of Emergency Situations)
- Antiquated ropeway in the key winter resort of Tsaghkadzor
- Inadequate level of income among resident population to access expensive winter tourism
- Inadequate quality and quantitative supply of sound accommodation in main winter resorts
- Issue of licensing winter tourism sector representatives
- Lack of development programs of winter tourism, which reduces attractiveness of potential resorts such as Lake Arpi National Park
- Lack of basic infrastructure in mountain areas
- Lack of marketing activities to promote winter tourism
- Lack of professional education of winter tourism sector representatives
- Lack of public financial resources and private investments
- Lack of public transportation to key winter tourism sites
- Lack of specialized schools and training programs of specialists in winter sports
- Lack of statistical data by regions and destinations about incoming and domestic tourists' winter visits
- Lack of summer offer that can complement the winter season, reduce seasonality and strengthen profitability of private operations
- Low number of direct flights to Armenia and high level of air ticket prices in winter season
- Main ski resort (Tsaghkadzor) planned according to old-fashioned '60s and '70s planning approach
- Transport infrastructures not in good condition at some winter resorts (for example, Ashotsk is not accessible in winter for all types of cars)

⁸² The analysis is based on surveys, investigations among tourists, sphere organizations and other bodies representing tourism sphere.



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- Winter seasonality that reduces the profitability of tourism services

3.5.3. Opportunities

- Accrued tourists' interest for nature-based, health and well-being, living local and doing good travelling as a consequence of post-COVID-19 pandemic
- Increasing affluent European winter tourists looking for new destinations
- Increasing international demand for adventure tourism product niches, implemented in winter season as well, such as mountain biking, zip-lining, quad biking, horse-riding, rock climbing, ice climbing, paragliding, zorbing and caving
- Increasing international demand for niche winter sport activities such as cross-country, heli-skiing, snowboarding, sledding, snowshoeing and tobogganing
- Increasing international demand for tourism product niches such as the growing wellness tourism⁸³, rural tourism⁸⁴, spiritual tourism⁸⁵ which might differentiate traditional winter tourism products
- Increasing Russian market following international situation

3.5.4. Threats

- Accrued tourists' interest for travelling as safely and healthily as possible priorities as a consequence of post-COVID-19 pandemic
- Increasing environmental awareness of affluent international tourists
- Increased maturity of the traditional skiing tourism market
- Increasing number of tourism options in the snow season available to international tourists, including sun and sand tropical destinations
- Possible further restrictions because of COVID-19 pandemic
- Possible reduction in the number of incoming tourists due to the political conflict with neighboring countries
- Potential environmental impacts from mass activities, such as increased pollution and waste management problems
- Climate change reducing the availability of snow for winter sports and jeopardizing skiing resort profitability
- Risks and hazards that may occur (earthquakes, natural disasters, etc.)

⁸³ According to UNWTO (2019), wellness tourism is about engaging in preventive, proactive, lifestyle-enhancing activities such as fitness, healthy eating, relaxation, pampering and healing treatments. It is "a type of tourism activity which aims to improve and balance all of the main domains of human life including physical, mental, emotional, occupational, intellectual and spiritual" UNWTO (2019). *UNWTO Tourism Definitions*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420858>.

⁸⁴ "Type of tourism activity in which the visitor's experience is related to a wide range of products generally linked to nature-based activities, agriculture, rural lifestyle/culture, angling and sightseeing". Mountains are a perfect setting for rural tourism, as activities take place in areas with a low population density; they have scenic landscapes and land use dominated by agriculture and forestry, and are dominated by traditional social structures and lifestyles. Depending on the host communities, time of year, and the interests of the visitor, shared activities may include agriculture, handicrafts, culinary activities/sampling typical foods, learning about medicinal and native plants, planting, harvesting, making cheese, handling animals and other activities related to daily life in rural communities, including traditional ceremonies, dancing and festivals. UNWTO (2019). Op. cit.

⁸⁵ Spiritual tourism is based on a variety of motivations, ranging from traditional religious tourism to alternative medicine to forms of deep immersion in nature. Activities include religious pilgrimages, visiting sacred sites, travel for worship and religious missions, and visits to natural environments such as forests, lakes, gardens, bird and animal parks, botanical gardens, caves and rocks for spiritual reasons. Mountains are often pilgrimage destinations or places for alternative medicine. UNWTO (2019). Op. cit.



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3.6. Key gaps to be filled for Winter Tourism development

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

- Inadequacy of traditional skiing (Tsaghkadzor) and health (Jermuk) resorts to satisfy contemporary tourist needs;
- Incompleteness of the winter tourism value chain at new destination (Arpi National Park, Ashotsk, Lernanist, Mets Sepasar);
- Low awareness and market visibility of the Armenia Winter Tourism attractions;
- Low local economic impact from Winter Tourism product;
- Lack of basic institutional tools for Winter Tourism development (legislation, financial incentives, statistics, etc.)

4. RECOMMENDED DEVELOPMENT POLICIES

4.1. Strategy

4.1.1. Development objectives and policies

The main goal of the strategy is to develop sustainable and competitive portfolio of winter tourism destinations in Armenia, which is well visible and accessible by perspective domestic and international tourism demand and capable to compete with international winter resorts while addressing key challenges such as climate changes and shifting needs of winter tourists, and being rooted in the local context so that to contribute to economic development of guest communities.

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

- 1. Creation of a portfolio of contemporary winter resorts based on sports and health**
- 2. Assurance of the market visibility and accessibility of such portfolio**
- 3. Increase of the economic impact from winter tourism**
- 4. Adaptation of the institutional framework for winter tourism development**

4.1.2. Specific objectives

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

- 1. Creation of a competitive portfolio of winter resorts based on sports and health**
 - 1.1. Upgrade existing main skiing and health resort
 - 1.2. Introduce new all-season recreation and entertainment resort
 - 1.3. Organize agenda of winter tourism events
 - 1.4. Increase capacity of winter tourism operators
- 2. Assurance of the market visibility and accessibility of such portfolio**
 - 2.1 Adopt effective marketing strategies
 - 2.2 Make winter tourism products more accessible
- 3. Promote positive impacts on host community and Armenian economy**
 - 3.1. Involve local communities
 - 3.2. Incentivize local micro-entrepreneurs
- 4. Update the regulatory framework for winter tourism development**
 - 4.1 Regulate winter tourism professions and operators
 - 4.2 Regulate the tourism statistics collection

4.1.3. 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 portfolio of winter resorts based on sports and health	1.1 Upgrade existing main skiing and health resort	1.1.1 Implement Tsaghkadzor development plan
		1.1.2 Implement Jermuk development plan
		1.1.3 Implement development plans for other sites
		1.1.4 Improve winter tourism infrastructures
		1.1.5 Improve basic infrastructures
	1.2 Introduce new all-season recreation and entertainment resort	1.2.1 Complete Myler Mountain Resort
	1.3 Organize agenda of winter tourism events	1.3.1 Formulate and promote a national agenda of winter sport events
1.3.2 Formulate and promote a national agenda of winter festivals		
1.4 Increase capacity of winter tourism operators	1.4.1 Develop educational and training programs for private sector operators	
	1.4.2 Promote international training exchange programs	
2. Assurance of the market visibility and accessibility of such portfolio	2.1 Adopt effective marketing strategies	2.1.1 Develop a web winter tourism marketing strategy
		2.1.2 Develop a trade and press marketing strategy
		2.1.3 Develop analogic marketing tools for local information provision
	2.2 Make winter tourism products more accessible	2.2.1 Increase on-site accessibility through development of the “Accessible Armenia Tourism Plan”
2.2.3 Increase on-line accessibility through VR/AR		
3. Promote positive impacts on host community and Armenian economy	3.1 Involve local communities	3.1.1 Adopt the concept of winter tourism ecosystems at local level (mountain tourism districts)
		3.1.2 Promote the diffusion of new accommodation models in mountain areas
	3.2 Incentivise local micro-entrepreneurs	3.2.1 Introduce micro-grants mechanism for winter tourism sector
		4. Update the regulatory framework for winter tourism development
4.1.2 Regulate winter tourism accommodation		
4.2. Regulate the tourism statistics collection	4.2.1 Implement visitor statistics at winter tourism sites	
	4.2.2. Implement visitor satisfaction surveys	

Figure 3: Strategic and specific objectives and actions for winter tourism development in the



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5. SUSTAINABILITY RECOMMENDATIONS

5.1. Enhancing economic benefits

The action plan has been devised so that to maximize economic benefits on the communities that host the winter 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 winter tourism.

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

- Upgrading of the offer;
- ▶ **Implementing development plans at Tsaghkadzor, Jermuk and progressively to other winter sites which are aimed at upgrading the current supply. Along with the provision of other infrastructure planned in the medium term, this will make them more attractive and competitive on the international sphere;**
- ▶ **Implementation of low-cost marketing activities (web cultural marketing strategy, trade and press marketing strategy, alongside with minor analogical tools) which are usually featured with high financial returns compared to investments;**
- ▶ **Increasing online accessibility to winter tourism sites through VR/AR applications that will be associated to weather forecasts and snow condition information, which will stimulate tourism demand and might be associated to special commercial offers;**
 - Involvement of residents in tourism services provision;
- ▶ **Introduction of micro-grants mechanism for the cultural and creative sector, from which might benefit mostly the local communities;**
 - Raising of private finance for investments in winter tourism;
- ▶ **Involvement of private operators through access to PPP mechanism for financing the interventions.**

5.2. Preventing socio-cultural problems and encouraging community involvement

Particularly mountain communities 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.⁸⁶

In order to enhance the socio-cultural benefits of cultural and heritage tourism development at the community 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;
- ▶ **Involve local communities while adopting the concept of winter tourism ecosystems at local level (mountain districts) building also on the positive example of Alpine destinations.**
 - Making social services available to the community and favor access of residents to sport structures and services;
- ▶ **Increase the accessibility to winter sport sites through development of the “Accessible Armenia Tourism Plan”, from which will directly benefit people with special needs living in local communities.**
 - Valorizing community traditional crafts, skills, customs;
- ▶ **Valorizing Armenia immaterial traditions, through promoting authentic winter events (“National agenda of winter festival”).**
 - Preserve vernacular architecture;

⁸⁶ World Tourism Organization (2004). *Indicators of Sustainable Development for Tourism Destinations*. Madrid: WTO



► **The action plan foresees to promote a new form of winter tourism accommodation, based on authentic architecture, including re-use and valorization of traditional house as scattered hotels and mountain refuges⁸⁷.**

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

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

5.3. Preventing negative environmental impacts

As mentioned above, the plan contributes positively to the preservation and protection of mountain sites through restoration of available assets, such as vernacular houses, in order to use it for accommodation purposes. Nevertheless:

- It must be ensured that winter sport practice, in particularly new ski slopes, do not impact negatively on the natural environment, making necessary the implementation on environmental impact assessment;

► **The impact of new ski slopes on native wildlife and biodiversity must be assessed.**

- On the other hand, the implementation of snow-making equipment at ski resorts helps to mitigate climate-change impacts on mountain resorts;

► **The provision of snow-making equipment at ski resorts helps to mitigate climate-change impacts on mountain resorts.**

Jermuk is a spa resort and one of the priority sites for winter tourism development in Armenia.

► **The proposed development plan for Jermuk should consider the possible negative impact of the Amulsar gold mine's exploitation on tourism in the region.**

Operation of the gold mine can threaten the cultural ecosystem services, in particular the recreational, spiritual, and aesthetic values of Jermuk. Currently, the mining project is suspended due to opposition of local communities, environmental activists, and tourism industry representatives.

In the framework of IBiS program, GIZ and the Ministry of Environment of the RA, have studied the feasibility of introducing of **Payments for Ecosystem Services (PES) voluntary scheme in Tsaghkadzor**. According to the study, the majority of the hotels in Tsaghkadzor emphasize the importance of forest ecosystems and expressed their readiness to participate in the scheme

► Further implementation of such a scheme can **positively impact forest ecosystems** in the area and reduce anthropogenic pressure on the environment.

Armenia is one of the vulnerable countries facing various impacts of **climate change**. According to the Fourth National Communication on Climate Change, it is projected to raise the temperature in the country up to 4.7°C by 2100 and reduction of annual precipitation (8.3%). Significant decrease of snowfall negatively affects snow reliability and cover the depth of ski resorts both locally and globally.

► **Unfortunately, there is no data about the environmental and economic impact of climate change on the winter tourism industry in Armenia.**

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 governmental decree "On Approving Climate Change Adaptation Program in Sector of Tourism". It should incorporate adaptation measures for the tourism sector, including winter tourism. It is also necessary to evaluate the impact of snowmelt on winter tourism.

5.4. Manpower planning

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

⁸⁷ As best practice see, for example, the [holiday houses in Carnia](#), Italy. These are old houses in a typically rural style, ancient farmhouses and out-buildings, which have been carefully restored to offer guests a warm and welcoming stay. They are part of the "alnergo diffuso" model, which allow guests to manage their own time and living space with all the advantages of a traditional, centrally coordinated hotel structure with a single reception point available at all times for assistance, information and suggestions. The hotel complex covers the picturesque centres of Comeglians, Ravascletto and Rigolato, the most beautiful villages of the Carnic mountain area in the Friuli Venezia Giulia region and serve the Monte Zoncolan ski slopes.



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- Youths are encouraged to increase their skills and competences in winter-sport and tourism related activities, such as ski or snowboard instructor, or scattered hotels manager, etc.

▶ **Increasing the capacity of winter tourism operators, through developing educational and training programs and foreseeing the establishment of training centers at key winter tourism resorts;**

- Youths and tourism operators are also encouraged to take part at international training programs;

▶ **Promoting international training exchange programs, particularly aimed to expose youths to best experiences in winter tourism management, particularly by taking advantage of dedicated EU border programs.**

5.5. Adoption of consistent legislation

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

- Recognition of winter tourism professions and operators;

▶ **Regulating winter tourism professions and operators and recognition of certified ski/snowboard instructors;**

- Regulation of winter tourism statistics;

▶ **Adopting a national system of winter tourism cultural statistics, coupled with visitors' and residents' surveys, to be implemented with cooperation of Armenia universities.**

- Development of action plan to mitigate the risks caused by climate change, as Armenia is recognized to be a country with vulnerable mountain ecosystems in terms of the climate change. According to the reports on National Determined Contributions, Armenia has already reached to the point 1.5 degrees' Celsius increase of the temperature, which means that investments winter tourism shall be protected by the mechanism of insurance, in order to be attractive for the investors.

▶ **Setting the system of insurance for the investments in winter tourism development**

- Compliance of Community development programs timing with that of tourism development projects. Community development programs are adopted after each local election for five-year period, which is regulated by the Law on Local Self-Governance. In the tourism development areas, the indicated programs shall be corresponded to the tourism development projects, as they can be interrelated and even contravening with regard to budget contributions, community development directions, etc.

▶ **Developing the community development programs or even the Master Plans of the winter tourism related communities based on the winter tourism development projects, including in Aparan, Yenoqavan Yeghegis, and other factual winter tourism areas.**

5.6. Investment policies and incentives

Building on the experience of other international winter tourism destinations, the development of the winter tourism niche might benefit from the provision of dedicated micro-grants aimed to stimulate particularly youths, women and residents' participation:

▶ **Introduction of micro-grants mechanism for the winter tourism sector. The establishment of such micro-grants might be endorsed by the approval of a dedicated national law.**

5.7. Organization and management of the 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 Education, Science, Culture and Sport, which is involved in sport policies or the National Olympic Committee, which for instance owns which owns the Tsaghkadzor ropeway.

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

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

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



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

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

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

According to the draft Governmental Decree "On Approving Climate Change Adaptation Program in Sector of Tourism", touristic destinations such as Jermuk, Tsaghkadzor, Areni and Ashotsk are the most vulnerable locations in relation to heat waves, whereas Syunik and Shirak provinces for cold waves. According to the Fourth National Communication on Climate Change, climate extreme indices pointed out increase of heat waves by 2.0-7.6 days/10 years, decrease of cold waves by 0.7-1.4 days/10 years (alt. up to 2000 m). 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 touristic destinations including Garni, Geghard, Jermuk. The snowstorms are another important phenomenon influencing winter tourism. In addition, significant decrease of snowfall negatively affects snow reliability and cover the depth of ski resorts both locally and globally. According to the above-mentioned National Communication, lack of data on tourism sector and on snow cover in high altitudes in Armenia is a major barrier to assess the vulnerability of the winter tourism sector to climate change impacts.

Please note that there is no data available about the frequency of heat waves for specific destinations

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.

Taking into account the climate conditions, here are the main favorable locations for downhill skiing and cross-country skiing in Armenia, which should be taken into account:

- Surroundings of Krashen, Sarian, Amasia, Hartashen villages of Shirak marz. Here, in the winter months, it is possible to organize both amateur and specialized skiing.
- There are favorable landscapes for skiing in Lori Marz around Tezhler, Maymekh, Mayrasar mountains, which are currently not used for this purpose.
- In Aragatsotn Marz, the slopes of Mount Aragats are more favorable for skiing as here the snow lasts longer.

Specific objective	Key action	Years									
		1	2	3	4	5	6	7	8	9	10
1.1 Upgrade existing main skiing and health resort	1.1.1 Implement Tsaghkadzor development plan	☐	☐								
	1.1.2 Implement Jermuk development plan		☐								
	1.1.3 Implement development programs for other sites				☐						
	1.1.4 Improve winter tourism infrastructures			☐							
	1.1.5 Improve basic infrastructures				☐						
1.2 Introduce new all-season recreation and entertainment resort	1.2.1 Complete Myler Mountain Resort	☐									
1.2 Organize agenda of winter tourism events	1.2.4 Formulate and promote a national agenda of winter sport festivals			☐							
	1.3.1 Formulate and promote a national agenda of winter festivals	☐									
1.3 Increase capacity of winter tourism operators	1.4.1 Develop educational and training programs for private sector operators		☐								
	1.4.2 Promote international training exchange programs			☐							
2.1 Adopt effective marketing strategies	2.1.1 Develop a web winter tourism marketing strategy		☐								
	2.1.2 Develop a trade and press marketing strategy		☐								
	2.1.3 Develop analogic marketing tools for local information provision		☐								
2.2 Make winter tourism products more accessible	2.2.1 Increase on-site accessibility through the "Accessible Armenia Tourism Plan"					☐					
	2.2.2 Improve basic infrastructure					☐					
	2.2.2 Increase on-site accessibility through VR/AR					☐					
3.1 Involve local communities	3.1.1 Adopt the concept of winter tourism ecosystems at local level			☐							
	3.1.2 Promote the diffusion of new accommodation models in mountain areas			☐							
3.2 Incentivate local micro-entrepreneurs	3.2.1 Introduce micro-grants mechanism for the winter tourism sector			☐							
4.1 Regulate winter tourism professions and operators	4.1.2 Regulate winter tourism professions		☐								
	4.1.3 Regulate winter tourism accommodation		☐								
4.3 Regulate the tourism statistics collection	4.2.1 Implement visitor statistics at winter tourism sites				☐						
	4.2.2. Implement visitor satisfaction surveys				☐						

Table 5: Time schedule for Winter Tourism development in Armenia

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



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ANNEX 1 - List of Licensed sanatoriums operating at the resorts of Armenia

List of Licensed sanatoriums operating at the resorts of Armenia ⁸⁸						
N.	Name	Serial number	Date of receiving the license	Type of services	Place	Information about functioning as of August 22, 2022
1.	Ripa Sanatorium LLC	K-XX-000053	25.02.2003	Medical assistance and service (physiotherapy, neurology, general medical practice, mixed general stomatology, laboratory-diagnostic (clinical, biochemical), balneology, dietology, kinesotherapy (rehabilitation))	Tsaghkadzor city, Kecharetsu str.	operates as a hotel, does not provide spa-resort services
2.	"Arzni sanatorium" CJSC	K-XX-000040	11.02.2003	Medical care and service (physiotherapy, laboratory-diagnostic (clinical, biochemical), cardiology, balneology, dietology, kinesiotherapy (rehabilitation), diagnostic department, mixed general stomatology)	Kotayk region, village Arzni	Operates

⁸⁸ The list was provided by the Ministry of Health of the RA.



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3.	"Resorts of Armenia" social health fund - Arzni polyclinic-sanatorium	K-XX-000681	29.04.2005	Medical care and service (general medical practice, cardiology, neurology, endocrinology, gastroenterology, pulmonology, gynecology, physiotherapy, balneology, functional diagnostics (ultrasound, electrocardiography), dietetics, movement therapy, laboratory diagnostics (clinical, biochemical), reflexotherapy, manual therapy (medical massage), therapeutic dentistry, surgical dentistry)	Kotayk marz, Arzni sanatorium	Operates
4.	"Arzni Group" Arzni-1 sanatorium LLC	K-BO-001886	26.11.2013	Medical care and service (internal medical (general therapeutic), gynecological, physiotherapeutic (balneological), functional diagnostic, radiation diagnostic (ultrasound))	Kotayk Marz, Arzni, Sanatorium No. 31 Street	Operates
5.	"Hankavan Khotorjur sanatorium" LLC	K-XX-001032	11.07.2007	Medical care and service (General medical practice, pediatric, physiotherapeutic, functional diagnostic (electrocardiography), laboratory diagnostic (clinical, biochemical))	Hrazdan, Karmir Valley	operates as a hotel, does not provide spa-resort services
6.	"Gandzaghbyur" LLC	K-XX-001237	24.09.2008	Medical care and service (general medical practice, pediatric, reflexotherapy, therapeutic massage/manual therapy/, physiotherapeutic, rehabilitation, balneological)	Kotayk Marz, Arzakan village	not working
7.	"BLUE CRYSTAL" LLC - Paradise Park Resort Aghveran	K-BO-002853	3/11/2021	Medical care and service (general medical practice, pediatric, physiotherapeutic, rehabilitation (balneological, reflexotherapy, manual therapy, therapeutic massage))	Kotayk region, Arzakan, Barekamutyun street 66	It has a license but still operates as a hotel



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8.	"Jermuk-3" sanatorium" LLC - Olympia	K-XX-000046	25.02.2003	Medical care and service (physiotherapy, neurology, gynecology, general medical practice, laboratory-diagnostic (clinical, biochemical), diagnostic department, kinesiotherapy (rehabilitation), balneology, dietetics)	Jermuk, Shahumyan 16	Operates
9.	"ARARAT" MOTHER AND CHILD Sanatorium CJSC	K-XX-000166	25.02.2003	Medical care and service (physiotherapy, physical therapy, mixed general stomatology (child and adult), laboratory-diagnostic (clinical, biochemical), balneology, dietology, kinesotherapy (rehabilitation))	Jermuk, Shahumyan 18	Operates
10.	"Jermuk Sanatorium " CJSC - Jermuk world	Կ-XX-000052	29.04.2003	Medical care and service (physiotherapy, kinesiotherapy, dietetics, functional diagnostics, laboratory diagnostics (clinical, biochemical), therapeutic massage, balneology, radiology, mixed general dentistry, general medical practice, gastroenterology, gynecology)	Jermuk, Shahumyan 20	Operates
11.	"Gladzor sanatorium" LLC	K-XX-000480	09.03.2004	Medical care and service (General medical practice, gastroenterological, therapeutic dentistry, surgical dentistry, gynecological, physiotherapeutic, balneological, functional diagnostic (electrocardiography), kinesiotherapeutic, dietetics, laboratory diagnostic (clinical, biochemical))	Jermuk, Meliq Adamyan 1	operates with very little load, about 2 months in summer



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12.	"Jermuk New Life Sanatorium" LLC - Armenia sanatorium	K-BO-002023	18.02.2015	Medical care and service (gastroenterological, physiotherapeutic, laboratory diagnostic (clinical, biochemical), rehabilitation, balneological, dietetic (dietological), functional diagnostic, radiological (ultrasound), physiotherapeutic, manual therapeutic, gynecological, endocrinological, neurological, cardiology, medical general practice	Jermuk, Myasnikyan 2	the spa-resort services will be available next year, now it is being renovated
13.	"JERMUK HOTEL & SPA" LLC	K-BO-002539	05.03.2019	Medical care and service (pre-medical care: nursing, general medical practice, gynecological, laboratory-diagnostic (clinical, biochemical (biochemical)), radiodiagnostic (ultrasound), physiotherapeutic, rehabilitative (balneological, mud therapy, movement therapy, reflexotherapy, manual therapy, therapeutic massage), functional diagnostic, halotherapeutic, clinical medication)	Vayots Dzor region, Jermuk, Myasnikyan street 27 building	Operates
14.	"JERSAN" LLC - Grand Resort Jermuk	K-BO-002821	1/21/2021	Medical care and service (general medical practice, restorative (balneological therapeutic massage), reflexotherapy, cosmetology, laboratory-diagnostic (clinical, biochemical (biochemical)), functional diagnostic)	Vayots Dzor region, Jermuk, Shahumyan Street 7/5	Operates



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15.	"Touris" LLC - Jermuk Moscow sanatorium	K-XX-001525	10.03.2011	Medical care and service (general medical practice, gynecological, physiotherapeutic, therapeutic massage, balneological, reflexotherapeutic/, radiation diagnostic /ultrasound/, functional diagnostic, laboratory diagnostic /clinical, biochemical/, dietetic, etiological/, gastrointestinal/gastroenterological/)	Jermuk, Melik-Adamyam 6	Operates
16.	"Vanadzor ASSA" LLC - Vanadzor Armenia hotel and resort complex	K-XX-000686	23.06.2005	Medical care and service (Cardiology, neurological, reflexotherapy, manual therapy (therapeutic massage), physiotherapy, functional diagnostics (ultrasound, electrocardiography), laboratory diagnostics (clinical, biochemical), movement therapy, rehabilitation (kinesiotherapy), sports medicine, gastroenterology, internal examination, gynecological, therapeutic dentistry, surgical dentistry)	Vanadzor, Zakharyan 31	Operates
17.	"SOCHUT" CHILDREN'S SANATORIUM CJSC	K-BO-002875	4/13/2021	Medical care and service (restorative (therapeutic massage), physiotherapeutic)	Lori marz, Gyulagarak community, children's sanatorium	Operates
18.	"Arevik sanatorium" LLC	K-XX-000090	06.05.2003	Medical care and service (physiotherapy, kinesitherapy, dietetics, laboratory-diagnostic (clinical), therapeutic massage, balneology, general medical practice, pediatrics, otolaryngology)	Gegharkunik, Lake Sevan	is operating, but spa -resort services are not provided now
19.	"Dilijan Resort Complex" CJSC - Impulse	K-XX-001236	05.09.2008	Medical care and service (Gynecological: therapeutic massage /manual therapeutic/, physiotherapeutic)	Dilijan, Parz Lich 14	not working



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20.	"MOUNTAIN ARMENIA" REST HOUSE FOUNDATION OF THE MINISTRY OF DEFENSE OF THE REPUBLIC OF ARMENIA	K-BO-002769	9/11/2020	Medical care and service (pre-medical care: nursing, family medicine, physiotherapy (electrotherapy, light therapy), rehabilitation (balneological, mud therapy, movement therapy, reflexotherapy, manual therapy, therapeutic massage), clinical medicine)	Marz Tavush, city Dilijan, Kamoi street 137/2	Operates
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Table 6: List of Licensed sanatoriums operating at the resorts of Armenia



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ANNEX 2 – Methodology of the research

The research was done using the following quantitative and qualitative research methods: observation, interviews, statistical data analysis.

The interviews were done among the following stakeholders:

- Ashotsk Sky center representative, interview was done by phone, with open questions, on September 15, 2022.
- Representative of Lernanist tourism information center, interview was done by phone, with open questions, on September 15, 2022.
- Head of Tsaghkadzor Community, interview was done by phone, with open questions, on September 16, 2022.
- The Armenian Mountaineering and Mountain Tourism Federation, interview was done by phone and email, with open questions, on September 23, 2022.
- National Olympic Committee representative, interview was done by phone, with open questions, on October 13, 2022.
- 20 sanatoriums, which are presented in the Annex 1, interviews were done by phone in August, 2022, to find out if they operate currently, or not.



ANNEX 3 – Detail of actions

1. Creation of a competitive portfolio of winter resorts based on sports and health

1.1. Upgrade existing main skiing and health resort

1.1.1. Implement Tsaghkadzor development plan

Action	1.1.1 Implement Tsaghkadzor development plan
Strategic objective	1. Creation of a competitive portfolio of winter resorts based on sports and health
Specific objective	1.1 Upgrade existing main skiing and health resort
Description	<p>Development of Tsaghkadzor winter tourism development plan, which is expected to:</p> <ul style="list-style-type: none"> Strengthening traditional winter sports activities Increasing cross-country skiing, snowshoeing, heli-skiing, snowboarding, sledding, snowshoeing and tobogganing Targeting new growing adventure segment niches during and outside the snow season, to reduce winter seasonality and enhance the profitability of tourism services, such as mountain biking, zip-lining, quad biking, horse-riding, rock climbing, ice climbing, paragliding, zorbing and caving Integrating traditional snow tourism with other all-year round tourism niches such as wellness tourism, rural tourism, spiritual tourism
Key activities	<ul style="list-style-type: none"> Conduction of surveys with main stakeholders to understand the key issues for developing winter tourism in Tsaghkadzor Creation of a Tourism Development Committee involving key public and private stakeholders. Such Committee will be created at local level, preferably by the forthcoming Kotayk DMO, which will be a regional branch of the TC. It is relevant to highlight that the TC, according information provided for Assignment 1.2 – Local Context Analysis, is currently working on a Tsaghkadzor cluster. Formulation of the winter tourism development plan for Tsaghkadzor, including assessment of the main infrastructures Creation of a brand for Tsaghkadzor as a winter destination and implementation of active marketing Construction of a new and modern centre of sports equipment which will be sold to visitors and also given for a rent Construction of a new ropeway, with closed cabins, which will carry 12-16 people
KPIs	<ul style="list-style-type: none"> Approval of Tsaghkadzor development plan No. of new winter tourism activities proposed per year No. of adding touristic flows (each year more than 20 % than previous year) Approval of new brand for Tsaghkadzor as a winter destination New ropeway and new infrastructures in 2026
Subject responsible	<ul style="list-style-type: none"> Tourism Committee National Olympic Committee Local government bodies of Tsaghkadzor Private sector
Key stakeholders involved	<ul style="list-style-type: none"> Tour companies Kotayk region Tourists
Source of funding	Public/Private
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> Adopt a PPP framework to involve private stakeholders in the investment and management of the plan Involve the National Olympic Committee, which owns Tsaghkadzor ropeway Ensure the compliance of tourism development projects timing with that of Community development programs



1.1.2. Implement Jermuk development plan

Action	1 .1.2 Implement Jermuk development plan
Strategic objective	1. Creation of a competitive portfolio of winter resorts based on sports and health
Specific objective	1.1 Upgrade existing main skiing and health resort
Description	<p>Development of Jermuk winter&health tourism development plan including the health resort, which is expected to:</p> <ul style="list-style-type: none"> • Strengthening winter sports activities • Integrating traditional snow tourism with other tourism product niches such as the growing wellness tourism, rural tourism, spiritual tourism
Key activities	<ul style="list-style-type: none"> • Conduction of surveys with main stakeholders (sanatoriums) to understand the key issues for developing winter and health tourism in Jermuk • Creation of a Tourism Development Committee involving key public and private stakeholders. Such Committee will be created at local level, preferably by the forthcoming Vayots Dzor DMO, which will be a regional branch of the TC. It is relevant to highlight that the TC, according information provided for Assignment 1.2 – Local Context Analysis, is currently working on a Jermuk cluster. • Formulation of the winter tourism development plan for Jermuk, including assessment of the main infrastructures • Creation of an official tourism website for Jermuk which will present the main tourism assets and attractions of Jermuk • Creation of a brand for Jermuk as a winter and health destination and implementation of marketing activities via official tourism website for Jermuk • Construction of a new and modern center of sports equipment which will be sold to visitors and also given for a rent • Construction of a new ropeway
KPIs	<ul style="list-style-type: none"> • Approval of Jermuk development plan • No. of new winter tourism activities proposed per year • No. of adding touristic flows (each year more than 20 % than previous year) • Approval of new brand for Jermuk as a winter and health destination • New winter tourism infrastructures in 10 years
Subject responsible	<ul style="list-style-type: none"> • Local government bodies of Jermuk • Tourism Committee • Private sector
Key stakeholders involved	<ul style="list-style-type: none"> • Tour companies • Vayots Dzor region • Tourists
Source of funding	Public/Private
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> • Adopt a PPP framework to involve private stakeholders in the investment and management of the plan • With regard to the marketing plan: <ul style="list-style-type: none"> - Create an official tourism webpage in Armenian, English, Russian and other languages • Ensure a timing complying with that of Community development programs



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1.1.3. Implement development programs for other sites

Action	1.1.3 Implement development plans for other sites (For example, Lernanist, Ashotsk)
Strategic objective	1. Creation of a competitive portfolio of winter resorts based on sports and health
Specific objective	1.1 Upgrade existing main skiing and health resort
Description	Creating winter tourism development programs
Key activities	<ul style="list-style-type: none"> • Mapping of sites according to type of current or potential activity (downhill, cross-country). Sites considered will include <ul style="list-style-type: none"> ○ Lernanist, Ashotsk ○ Surroundings of Krashen, Saria, Amasia, Hartashen villages of Shirak marz. ○ Surroundings of Tezhler, Maymekh, Mayrasar mountains, which are currently not used for this purpose, in Lori Marz ○ Alopes of Mount Aragats, which are more favorable for skiing as here the snow lasts longer, in Aragatsotn Marz • Classification of key sites according to strategic analysis and capability (using the competitive position / industry attractiveness General Electric business screen for instance) • Conduction of surveys with main stakeholders to understand the key issues for developing winter tourism at the identified site • Creation of a Tourism Development Committee involving key public and private stakeholders • Formulation of the winter tourism development plan for the identified site, including assessment of the main infrastructures, economic feasibility study, environmental impact assessment where needed • Creation of a brand for the identified site as a new winter destination and implementation of active marketing activities
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of No 1 new winter tourism development program per year • No. of adding touristic flows (each year more than 20 % than previous year) at site with tourism development program implemented
Subject responsible	<ul style="list-style-type: none"> • Tourism committee • Regions • Local government bodies • Winter tourism destinations
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sports of the RA • Ministry of Emergency Situations • Other State organs • Tourists • Private sector • Population of the RA
Source of funding	Public/Private
Time frame	Since the Year 4
Recommendations	<ul style="list-style-type: none"> • Adopt a PPP framework to involve private stakeholders in the investment and management of each plan • Engage the Ministry of Emergency Situations as a key stakeholder as a part of the development program, to strengthen the role of safety in the area • Include minimum standards of service quality in winter tourism sites development plans (including parking area, toilets for tourists, provision of necessary equipment for winter sports, etc.) • Ensure a timing complying with that of Community development programs



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1.1.4. Improve winter tourism infrastructures

Action	1.1.4 Improve winter tourism infrastructures
Strategic objective	1. Assurance of the market visibility and accessibility of such portfolio
Specific objective	1.1 Update existing main skiing and heath resort
Description	Developing winter tourism infrastructures at key winter tourism sites (in Ashotsk, Lernanist, Tsaghkadzor, Jermuk, etc)
Key activities	<ul style="list-style-type: none"> Assessment of the current situation of infrastructures at main winter tourism sites Formulation of plans for upgrading the infrastructures, by considering technical, financial and administrative feasibility Mark, as appropriate, the most applicable locations for skiing Establish automatic weather forecast stations to transmit weather forecast information to tourists with maximum accuracy and make this available online for tourists using the resources of the site. Currently, there is one station in the RA, operated by a private company, the information of which is not yet available to everyone). Establish a specialized safety 911 team, a rescue service, for skiers who will operate on a seasonal basis and for their normal operation it is necessary to create a separate station, equipped with specialized equipment, safety equipment, and appropriate transport. This should be done in cooperation with the rescue service of the RA Ministry of Emergency Situations.
Key Performance Indicators	<p>No. of developed infrastructures (including new ropeways, new bugles, parking areas, hotels and catering places, etc)</p> <p>No. of automatic weather forecast stations</p> <p>Separate station for specialized safety 911 team</p>
Subject responsible	<ul style="list-style-type: none"> Winter tourism destinations' managers Ministry of Emergency situations Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Regions Local government bodies Service providers Other State organs Tourists
Source of funding	Public and private sector
Time frame	3-10 years
Recommendations	<ul style="list-style-type: none"> Adopt a PPP framework to involve private stakeholders in the investment and management of the investments Ensure a timing complying with that of Community development programs Use crowdfunding mechanisms For marking the skiing places, it is necessary. <ul style="list-style-type: none"> ✓ To carry out a thorough study of the main landscapes, evaluation, research from the point of view of skier operation, ✓ To calculate the possible touristic capacity of the sites in order to cause the least possible damage to the environment. ✓ To create online digital maps to aggregate detailed information about the slopes.



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1.2. Introduce new all-season recreation and entertainment resort

1.2.1. Complete Myler Mountain Resort

Action	1.2.1 Complete Myler Mountain Resort
Strategic objective	1. Creation of a competitive portfolio of winter resorts based on sports and health
Specific objective	1.2 Introduce new all-season recreation and entertainment resort
Description	Completion of Myler Mountain Resort which was initiated planning for a ski resort in 2017-2018
Key activities	<ul style="list-style-type: none"> • Completion of the initial phase of the investment (construction of ropeways, creation of other infrastructures, artificial snowmaking systems and ski tracks) • Implementation of the whole project by 2035
KPIs	<ul style="list-style-type: none"> • Realization of 16 major lifts, including 1 Ten passenger two-section gondola, 9 high speed detachable chairlifts, and 5 fixed-grip quad chairs, plus a surface beginner platter lift and four conveyor surface beginner lifts • 100 marked ski pistes of all ability levels totaling 92 km of length • 13,436 units and 72,238 pillows buildout • In peak periods, 35,000 guests from overnight accommodation of which 12,000 skiers • Three villages realized: <ul style="list-style-type: none"> - Main ski village (1,704 units of overnight accommodation, 6,462 pillows) - Boutique Alpine Village (1,485 units and 6,980 pillows of overnight accommodation) - Golf and Lakefront Village (950 units and 3,350 pillows of overnight accommodation) • 1,500 permanent jobs created upon completion of the project • Acceptance of 6,000 skiers at a time
Subject responsible	The Myler Cluster Project
Key stakeholders involved	<ul style="list-style-type: none"> • Tourism Committee • Aragatsoth province • Yeghiapatrush village • Tour companies • Accommodation operators • Other relevant tourism operators • Tourists
Source of funding	Private operators
Time frame	<ul style="list-style-type: none"> • Investment of over 60 million euros completed in the winter of 2023 • Completion of the whole project in 2032-2035
Recommendations	<ul style="list-style-type: none"> • Involvement of professional staff consisting of specialists with international qualifications



1.3. Organize agenda of winter tourism events

1.3.1. Formulate and promote a national agenda of winter sport events

Action	1.3.1 Formulate and promote a national agenda of winter sport events
Strategic objective	1. Creation of a competitive portfolio of winter resorts based on sports and health
Specific objective	1.3 Organize agenda of winter tourism events
Description	Organize competitions of winter sports which will involve sports lovers
Key activities	<ul style="list-style-type: none"> Identify the agenda by considering, for instance, the following: <ul style="list-style-type: none"> Organization of competitions like Yugikassen in other destinations as well; Organization of skiing, snowboarding, etc. Set a national promotion committed by involving key stakeholders Formulate a sound business plan for each Festival, so as to structure costs and revenues and foresee the potential contribution of donors and sponsors Market the events through the unique national agenda
KPIs	<ul style="list-style-type: none"> Set up of the national promotion Committee Approval of the national agenda by the Tourism Committee Implementation of new events at specific sites (each year at least 1 new sport event) Number of incoming and domestic tourists participating at the events (each year more than 20 % growth of tourists)
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Regions Local government bodies Tour companies Private sector NGOs and other companies of the sphere Communities Tourists
Source of funding	Public and private sector, Tourism Committee
Time frame	Since the Year 3
Recommendations	<ul style="list-style-type: none"> Each key destination should organize such an event to increase the number of tourists. There might be a yearly national call from the Tourism Committee to recognize “the winter sport event” of that year Benchmark best international experience Organize joint competitions with other countries’ winter tourism operators (for example with Georgia, at Ashotsk)



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1.3.2. Formulate and promote a national agenda of winter festivals

Action	1.3.2 Formulate and promote a national agenda of winter festivals
Strategic objective	1. Creation of a competitive portfolio of winter resorts based on sports and health
Specific objective	1.3 Organize agenda of winter tourism events
Description	Formulation of a national agenda of most relevant and peculiar cultural winter events to be marketed on the international markets, followed by organization of such festival
Key activities	<ul style="list-style-type: none"> Identify the agenda by considering, for instance, the following festivals: <ul style="list-style-type: none"> festivals of snowman Christmas market etc. Set a national promotion committed by involving key stakeholders Formulate a sound business plan for each Festival, so as to structure costs and revenues and foresee the potential contribution of donors and sponsors Market the festival through the unique national agenda
KPIs	<ul style="list-style-type: none"> Set up of the national festival Committee Approval of the national agenda by the Tourism Committee Implementation of new festivals based on cultural values (each year at least 2 new festival) Level of cultural value appreciation by Armenians and tourists, to be assessed by surveys Number of incoming and domestic tourists participating at the festivals (each year more than 20 % growth of tourists)
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Festival organizing companies Tour companies Private sector Regions Local government bodies Communities Tourists
Source of funding	Public and private sector, Tourism Committee
Time frame	Year 1
Recommendations	<ul style="list-style-type: none"> Festivals should be based on authentic traditions Festivals should include different winter sports activities In festivals, Armenian food and cuisine experiences should be valorized, also, by engaging tourists in some creative activities Benchmark best international experience



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1.4. Increase capacity of winter tourism operators

1.4.1. Develop educational and training programs for private sector operators

Action	1.4.1 Develop educational and training programs for private sector operators
Strategic objective	1. Creation of a competitive portfolio of winter resorts based on sports and health
Specific objective	1.4 Increase capacity of winter tourism operators
Description	Identification and implementation of capacity building for private operators in winter tourism management
Key activities	<ul style="list-style-type: none"> • Assessment of the training needs of private sector • Organization of educational and training programs together with universities, colleges and training centers including: <ul style="list-style-type: none"> - Training of specialized guides in winter sports tourism activities (e.g. ski or snowboard instructors), with multiple language skills - Preparing guides who may work with people with learning difficulties - Train security personnel - Establish a specialized safety 911 team, a rescue service, for skiers who will operate on a seasonal basis. This should be done in cooperation with the rescue service of the RA Ministry of Emergency Situations. • Opening of ski-teaching centers in Armenia • Provision of training
Key Performance Indicators	<ul style="list-style-type: none"> • No. of trained staff • No. of specialized guides in winter sports tourism activities with multiple language skills • No. of guides prepared to work with people with learning difficulties • Level of service by the staff as assessed by visitors' satisfaction surveys • Availability of services for people with learning difficulties • Launch of at least 1 short training for winter tourism operators in 1 year • Launch of at least 1 ski-teaching center in 3 years • Provision of ski-lessons for locals and tourists after opening ski-teaching center in 3 years, with more than 1000 participants yearly • Specialized safety 911 team as a rescue service
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee • Ministry of Emergency Situations
Key stakeholders involved	<ul style="list-style-type: none"> • State organs • Winter tourism organizations • Private sector • Universities • Training centers • Colleges • NGOs of the sphere Local government bodies • Tourists • Population of the RA
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> • The trainings should be done based on international best practice • The TC should decide the main program, based on priorities, such as the experts that should be trained



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1.4.2. Promote international training exchange programs

Action	1.4.2 Promote international training exchange programs
Strategic objective	1. Creation of a competitive portfolio of winter resorts based on sports and health
Specific objective	1.4 Increase capacity of winter tourism operators
Description	Implementation of international training exchange programs
Key activities	<ul style="list-style-type: none"> Organize training exchange programs through: <ul style="list-style-type: none"> Cooperation with international winter tourism resorts, international training centers, international universities, NGOs of the sphere Cooperating with Tourism Department of EU countries by accessing EU exchange programs Elaborate international certification system of winter tourism professions based on trainings and exams
Key Performance Indicators	<ul style="list-style-type: none"> Implementation of exchange program (each year at least 2 training exchange programs) Approval of international certification system of guides
Subject responsible	<ul style="list-style-type: none"> Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Ski resorts operators Training centers Universities Colleges NGOs of the sphere Local government bodies Other State organs Tourists
Source of funding	Public and private sector
Time frame	Since year 3
Recommendations	<ul style="list-style-type: none"> The trainings should enable to enlarge the cooperation in C&H tourism. Best organizations in the sphere should be considered for this.



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

2.1. Adopt effective marketing strategies

2.1.1. Develop a web winter tourism marketing strategy

Action	2.1.1 Develop a web winter tourism 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 winter tourism product in international markets
Key activities	<ul style="list-style-type: none"> Formulation of yearly winter tourism web marketing plan Implementation of the web marketing plan by for instance: <ul style="list-style-type: none"> Create a dedicated section in the official tourist website of RA <p><i>The information available on the official tourist website of the RA is very limited. It is necessary to have a separate title in https://armenia.travel/en: winter tourism, with its subsections, all winter tourism sites, possible activities, booking possibilities, etc-</i></p> <ul style="list-style-type: none"> Have a separate section on Armenian winter destinations and activities Implement Influencer marketing, Word of mouth marketing, viral marketing and SMM Invite international B-loggers and V-loggers
KPIs	<ul style="list-style-type: none"> No. of separate page for winter tourism on the main touristic portal No. of followers of social media
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> Winter tourism destinations IT companies Tourists
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	<p>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</p> <p>The following techniques should be used:</p> <ul style="list-style-type: none"> Influencer marketing by inviting famous people to main winter sites Word of mouth marketing, Viral marketing by social channels



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2.1.2. Develop a trade and press marketing strategy

Action	2.1.2 Develop a trade and press marketing strategy
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.1 Adopt effective marketing strategies
Description	Implementation of trade and press market activities
Key activities	<ul style="list-style-type: none"> • Formulation of yearly winter tourism trade and press marketing plan • Implementation of the yearly winter tourism trade and press marketing plan by for instance: <ul style="list-style-type: none"> ○ Organize fam-trips and press tours to winter tourism sites targeting key international markets for winter tourism ○ Couple fam trips ad press tours with roadshow at origin markets • Present the winter tourism product in international exhibitions
KPIs	<ul style="list-style-type: none"> • Each year 2 fam-trips and press tours organized to main winter sites • Each year 2 roadshow organized in origin countries • At least 5 journal articles and /or videos in international journals/channels in 1 year
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee • Private sector
Key stakeholders involved	<ul style="list-style-type: none"> • Winter tourism destinations • State bodies • Local government bodies • Tourists
Source of funding	Public and Private sector
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> • The trade and press marketing should be used widely towards main target market • Mix trade and consumer marketing • Involve private operators in the organization, so as to obtain free accommodation services and transfers for the participants of fam-trips from international markets



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2.1.3. Develop analogic marketing tools for local information provision

Action	2.1.3 Develop analogic marketing tools for local information provision about both tourism resources and health status
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.1 Adopt effective marketing strategies
Description	Development and implementation of analogic marketing tools mainly for local information provision about both tourism performance and health status
Key activities	<ul style="list-style-type: none"> • Formulation of yearly winter tourism marketing plan • Implementation of the yearly winter tourism marketing plan by for instance: <ul style="list-style-type: none"> ○ Develop tourist maps and booklets ○ Organize local press marketing ○ Organize local informational programs on local media which will present the main winter and health destinations ○ Organize local informational programs on local media which will present the cultural routes ○ Advertise health resorts and highlight the importance of visiting them in winter as a main mean to cure the body and relax
KPIs	<ul style="list-style-type: none"> • All the winter sites will be fixed by touristic maps in 3 years • Each month more than 10 news on local media about C&H sites providing information about tourism resources and health status by local media programs
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Private sector • Winter and health tourism destinations • Local media State organs • Local government bodies • Tourists
Source of funding	Public and private sector
Time frame	Since year 2
Recommendations	<ul style="list-style-type: none"> • The booklets should be in English and Russian as well (for international tourists). • They should include general information about Armenia, main activities for winter tourism, destinations, contacts, etc. • Local information provision may be via TV, radio, newsletters, journals, social media, etc.



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2.2. Make winter tourism products more accessible

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

Action	2.2.1 Increase on-site accessibility through development of the “Accessible Armenia Tourism Plan”
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.2 Make winter tourism products more accessible
Description	Formulation of a dedicated plan to ensure progressive accessibility at main winter tourism areas
Key activities	<ul style="list-style-type: none"> • Evaluate the necessity and urgency of developing such a plan • Surveys and interviews with main stakeholders, particularly those representing people with special accessibility needs • Creation of “Accessible Armenia Tourism Plan” including the main winter tourism destinations • Prioritize interventions • Formulate key detailed actions at chosen winter tourism destination to make the sites accessible • Raise the accessibility of winter tourism sites for people with physical disabilities
Key Performance Indicators	Winter sites will be accessible for all people based each year after the 5 th year
Subject responsible	Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Winter destinations • Other State organs • Local government bodies • Private sector • Tourists
Source of funding	Public and private sector
Time frame	Since year 5
Recommendations	<ul style="list-style-type: none"> • The action should be implemented at first taking into account the most visited and demanded winter sites by tourists • A 360° design for all approach should be adopted⁸⁹ • For the success of the actions, it is much advised to involve associations representing people with special needs

⁸⁹ See, for instance: <https://dfaeurope.eu/>



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2.2.2. Increase on-line accessibility through VR/AR

Action	2.2.3 Increase on-line accessibility through VR /AR
Strategic objective	2. Assurance of the market visibility and accessibility of such portfolio
Specific objective	2.2.3 Make winter tourism products more accessible
Description	Implementation of VR and AR digital solutions for the valorization of the winter tourism product (e.g. for snow conditions and weather forecasts)
Key activities	<ul style="list-style-type: none"> • Benchmark of international best experience • Implementation of a "Digital Winter Tourism in Armenia", by foreseeing solutions such as: <ul style="list-style-type: none"> ○ Using Virtual/Augmented Reality techniques for winter tourism ○ Using 3D modelling at winter tourism destinations ○ Using QR codes for winter tourism sites ○ Creating mobile app of winter tourism product ○ Provide 360° accessibility to main winter sites ○ Provide weather forecasts for snow season
Key Performance Indicators	<ul style="list-style-type: none"> • No. of virtual tours for winter sites (at least 5 tours yearly) • No. of mobile app (including booking opportunities), which will give the main touristic information as a virtual guide
Subject responsible	<ul style="list-style-type: none"> • Winter tourism sites • Tourism committee
Key stakeholders involved	<ul style="list-style-type: none"> • Tour companies • IT companies • Regions • Private sector • Other State bodies • Tourists
Source of funding	Public and private sector
Time frame	Since year 5
Recommendations	<ul style="list-style-type: none"> • The action should be implemented building on best international experience • The action can favor the growth of the IT sector, which might be stimulated by ad-hoc incentives



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3. Promote positive impacts on host community and Armenian economy

3.1. Involve local communities

3.1.1. Adopt the concept of winter tourism ecosystems at local level

Action	3.1.1 Adopt the concept of winter tourism ecosystems at local level
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.1 Involve local communities
Description	Implementation of cultural tourism ecosystems at key winter sites and approval of local action plans for promoting sustainable development ⁹⁰
Key activities	<ul style="list-style-type: none"> • Assessment of international best practice • Elaboration of a concept of winter tourism ecosystems provided with an organizational and financial model • Choose places for launching winter tourism ecosystems with identification of sites to be used as "pilot tests" (e.g. Ashotsk) • Organization of local cultural ecosystem committee • Formulation of local winter (tourism) development plans (LWDP) • Implementation of LWDP which will consider provision of micro-grants to the community to start business activities related to tourism services
Key Performance Indicators	<ul style="list-style-type: none"> • Each year one new winter tourism ecosystem established at winter tourism areas
Subject responsible	<ul style="list-style-type: none"> • Tourism Committee
Key stakeholders involved	<ul style="list-style-type: none"> • Other State organs • Local government bodies of the destination • Private sector • Population of the destination • Tourists
Source of funding	Public and private sector, international funding
Time frame	Since year 3
Recommendations	<ul style="list-style-type: none"> • The action can be implemented in different regions, according to the existence of winter tourism potential destinations • The ecosystem will associate key stakeholders and should dialogue with the regional DMO

⁹⁰ As a reference, see the long-lasting tradition of Local Action Groups, which since 1990 are adopted in EU to promote rural sustainable development: https://enrd.ec.europa.eu/leader-clld/lag-database_en



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3.1.2. Promote the diffusion of new accommodation models in mountain areas

Action	3.1.2 Promote the diffusion of new accommodation models in mountain areas
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.1 Involve local communities
Description	The action aims to promote the diffusion of hotels inspired by Armenian cultural values and history, such as scattered hotels, so as to foster sustainable development of communities
Key activities	<ul style="list-style-type: none"> • Exploration of international experiences in creating scattered mountain hotels (“Albergo diffuso”) and approval of a model of intervention • Assessment of pilot-places in Armenia where this model is suited to be implemented (e.g. Lermanist) • Development of a feasibility study for the realization of the investment starting with the sites that meet eligibility conditions • Involvement of an experienced private operator for the management of the scattered hotel by public tendering • Implementation of the investment
Key Performance Indicators	No. 1 widespread mountain hotels operating at least in 1 destination
Subject responsible	<ul style="list-style-type: none"> • Tourism committee • Local government bodies • Winter tourism destinations • Scattered hotel operator
Key stakeholders involved	<ul style="list-style-type: none"> • Regions • Other State organs • Villages • Residents • Tourists
Source of funding	Public and private sector, international funding
Time frame	Year 3
Recommendations	The action will take advantage of the regulation that has been foreseen in the “Cultural& Heritage” tourism niche



3.2. Incentivate local micro-entrepreneurs

3.2.1. Introduce micro-grants mechanism for winter tourism sector

Action	3.1.2 Introduce micro-grants mechanism for winter tourism sector
Strategic objective	3. Promote positive impacts on host community and Armenian economy
Specific objective	3.1 Incentivize local micro-entrepreneurs
Description	Provision of micro-grants to winter tourism enterprises
Key activities	<ul style="list-style-type: none"> Evaluate the need of micro grants to local winter tourism enterprises Define criteria for providing micro grants to local winter tourism enterprises, including for instance, the start-up of winter sport activities targeting tourists Elaboration of a program of providing micro-grants for winter tourism sector by setting the main criteria and the amount of the grant Launch of an yearly call for providing micro-grants at different winter tourism destinations Provision of micro-grants to local entrepreneurs, considering particularly to support youth and women entrepreneurship
Key Performance Indicators	<ul style="list-style-type: none"> Criteria for micro-grants in 3 years Each year providing at least 10 micro-grants to local arts & cultural enterprises
Subject responsible	<ul style="list-style-type: none"> Tourism committee State organs
Key stakeholders involved	<ul style="list-style-type: none"> Regions Local government bodies Private sector Winter tourism destinations Population of the RA Tourists
Source of funding	Public sector
Time frame	Since year 3
Recommendations	<ul style="list-style-type: none"> The objective of the action is to promote sustainable development of mountain areas, rising the life quality of population and socio-economic life particularly in villages by involving the residents in providing typical tourism offers. In each rural area more suitable places and activities should therefore be defined, and grants distributed to operators who wish to develop winter tourism offers in their area, starting with widespread accommodation but involving also other services of the winter tourism value chain As various destinations have development programs in place and search financial help (e.g. Ashotsk needs half million dollars, Lermanist needs 500 million Armenian drams) such destinations should be considered for this measure Youth and women MSMEs should be incentivized



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4. Update the regulatory framework for winter tourism development

4.1. Regulate winter tourism professions and operators

4.1.1. Regulate winter tourism professions

Action	4.1.1 Regulate winter tourism professions
Strategic objective	4. Update the regulatory framework for winter tourism development
Specific objective	4.1 Regulate winter tourism professions and operators
Description	The action foreseen the regulation of winter tourism professions so as to increase the quality of tourism service provided and to accrue value generated by tourism activities
Key activities	<ul style="list-style-type: none"> • Regulate winter tourism professions by fixing the main knowledge and skills needed from winter tourism specialists in educational programs • Introduce coherent high level of education in winter tourism in universities and colleges based on practical skills • Create legislative basis for preparing different kinds of winter tourism professionals • Use certification and licensing systems for recognizing official professionals of the sector
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of legislation about certification and licensing systems for professionals in winter tourism in 3 years • No. of specialized training courses offered at universities and colleges • No. of certified winter tourism professionals in 5 years
Subject responsible	<ul style="list-style-type: none"> • Tourism committee • Ministry of Education, Science, Culture and Sport
Key stakeholders involved	<ul style="list-style-type: none"> • State organs • Universities • Training centers • College • Local government bodies • Private sector • Associations • Tourists
Source of funding	Public sector
Time frame	Year 2
Recommendations	Winter tourism professions should be particularly targeted to youths and women



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4.1.2. Regulate winter tourism accommodation

Action	4.1.2 Regulate winter tourism accommodation
Strategic objective	Update the regulatory framework for winter tourism development
Specific objective	Regulate winter tourism professions and operators
Description	Rules for creating winter tourism accommodation
Key activities	<ul style="list-style-type: none"> • Explore international legislation on winter tourism accommodation (scattered hotels, mountain refugees, etc.), mountain districts, etc. • Create special conditions regulated by law, which will define the main criteria of cultural tourism accommodations • Define conditions for providing state subsidies for creating cultural tourism accommodations • Process rules for creating winter tourism accommodations, for regulating and monitoring the sphere
Key Performance Indicators	<ul style="list-style-type: none"> • Approval of rules for creating and implementing winter tourism accommodations in 3 years • No. of operating winter tourism accommodations
Subject responsible	<ul style="list-style-type: none"> • Tourism committee • Winter tourism destinations
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sports of the RA • Ministry of Emergency Situations • Other State organs • Regions • Local government bodies • Tourists • Private sector • Population of the RA
Source of funding	Public sector
Time frame	Year 2
Recommendations	Take advantage of international experience of countries with most advanced winter tourism sector



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4.2. Regulate the tourism statistics collection

4.2.1. Implement visitor statistics at winter tourism sites

Action	4.2.1 Implement visitor statistics at winter tourism sites
Strategic objective	4. Update the regulatory framework for winter tourism development
Specific objective	4.2 Regulate the tourism statistics collection
Description	Implementation of a system for collecting visitor statistics at winter tourism sites
Key activities	<ul style="list-style-type: none"> • Formulation of the visitors' statistics collection plan, considering the various sources • Implementation of a visitors' statistics unit at the TC • Starting the collection of data by considering that broader statistical recording is needed based on main tourism types: cultural-heritage, pilgrimage, gastro and wine, winter sports, etc. <ul style="list-style-type: none"> - Define a system of data which should be collected (number of tourists by origin, age, gender, number of stays, purchased services) - Organize data collection via hotel facilities at winter tourism sites - Organize data collection via tourism info centers - Organize data collection via ticket sell service if there are places which need ticket for entrance - Collect statistical data periodically
Key Performance Indicators	<ul style="list-style-type: none"> • Adoption of a system of data collection techniques in 3 years • Production of yearly winter tourism statistics
Subject responsible	Tourism committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • Regions • Local government bodies • Tourism info-centers • Private sector • Universities and research centers • Hotel facilities • Cultural sites • Other State organs • Tourists
Source of funding	Public sector
Time frame	Year 4
Recommendations	<ul style="list-style-type: none"> • Explore the international experience of gathering statistical data on winter tourism • Pay attention to engage all stakeholders in the process of gathering statistical data • Collaborate with communities, regions on data collection process • Collaborate with universities, research centers on data collection process • Consider the broad sources of statistical data, that can be obtained through hotel facilities, tourism info centers, tourism destinations, ski resorts, etc., as they start to record the number of visitors based on origin, gender, age, etc. • Specify the purpose of visit, as winter tourism is very broad and it may include many types of tourism.



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4.2.2. Implement visitor satisfaction surveys

Action	4.2.2 Implement visitor satisfaction surveys
Strategic objective	4. Update the regulatory framework for winter tourism development
Specific objective	4.2 Regulate the tourism statistics collection
Description	Set up a system to monitor the visitors' and residents' satisfaction level
Key activities	<ul style="list-style-type: none"> • Identify specialized research centers for creating customer satisfaction surveys • Include residents' survey in the plan • Formulate and approve the survey's methodology to be applied at winter tourism sites among tourists • Identify key winter tourism sites where surveys have to be applied • Organize surveys at winter 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 winter tourism • Organize quality research studies of winter tourism by cooperating with research centers • Based on survey results take steps to solve the problems in order to ensure high satisfaction of tourists
Key Performance Indicators	<ul style="list-style-type: none"> • Elaboration of a survey in 1 year • Organizing a survey in 1 year in every key C&H site
Subject responsible	Tourism committee
Key stakeholders involved	<ul style="list-style-type: none"> • Ministry of Education, Science, Culture and Sport • Winter sites management organizations • Research organizations • Universities • State organs • Local government bodies • Tourists
Source of funding	Public and private sector
Time frame	Year 4
Recommendations	<ul style="list-style-type: none"> • Surveys may be done monthly, quarterly, yearly, depending on the site, cooperating with research organizations • Results of the surveys should inform broader tourism actions • Surveys should be extended to residents, so as to monitor local satisfaction with tourism