

DILIJAN TOURISTIC CLUSTER VISION

ANALYSIS AND CONCEPTUALIZATION

18 OCTOBER, 2024

MAEUTICA
CONCEPT DEVELOPMENT COMPANY

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INTRODUCTION

STUDY AREA | APPROACH

DESTINATIONS

Creating a **sustainable destination vision/brand** is a blend of innovative ideas and cherishing legacy - deep dive into local authenticity and identity, then offering a fresh perspective on familiar surroundings.

Vision for Dilijan as a touristic cluster and a sustainable destination emerged from comprehensive research tailored to gain institutional and human insights into Dilijan as one of the true jewels of Armenia.

The gathered data subsequently fueled the strategic placemaking and development process /Diagram 1/.

In line with desk research, data was acquired through combination of several ethnographic methods: observations, interviews, talks, biographical interviews and oral histories. The last two methods provide an opportunity to get deep insights during the research. Micro-narratives open the layers of identity, memory, experiences, needs and visions on the example of one person and his linked social environments.

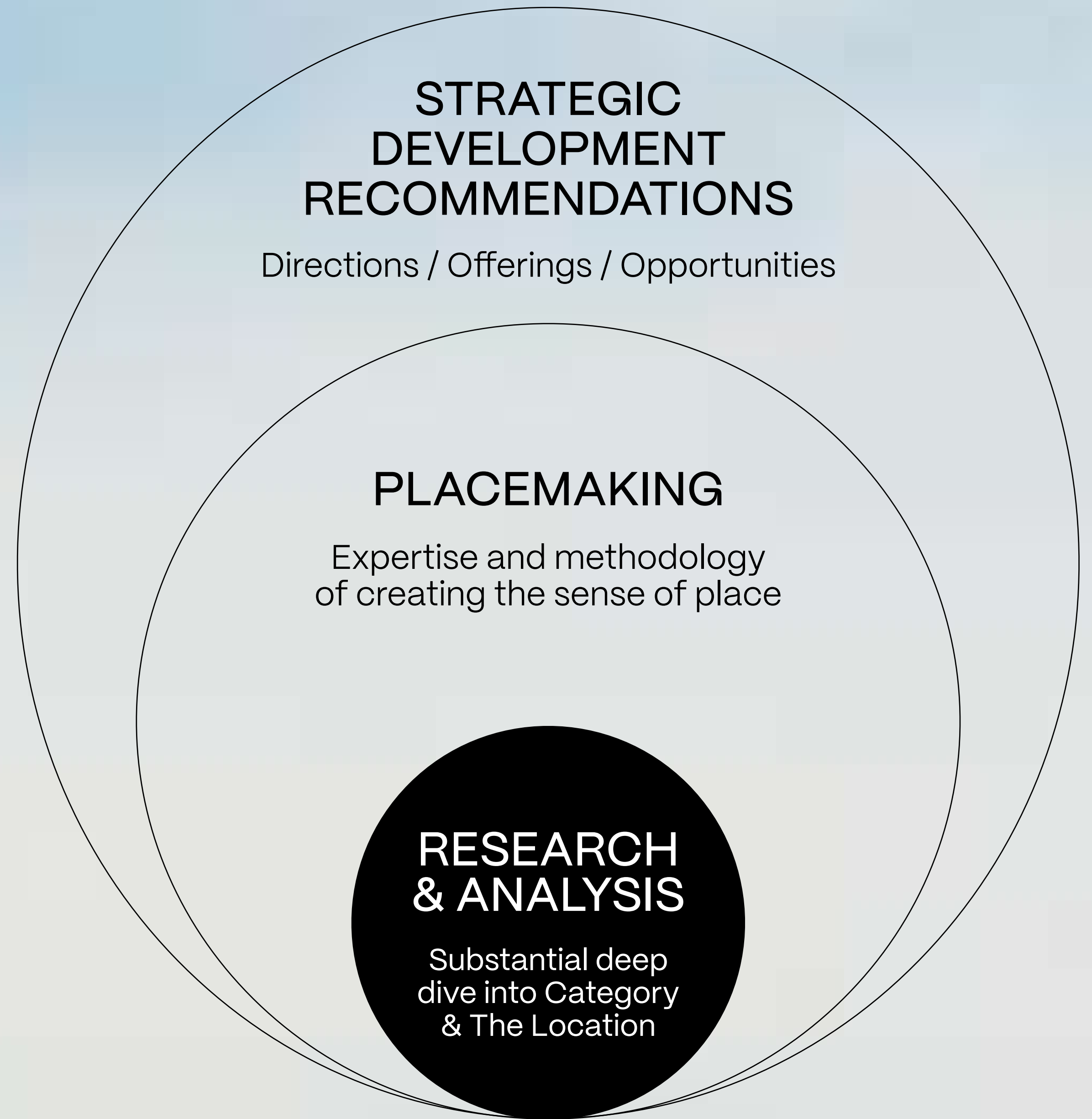
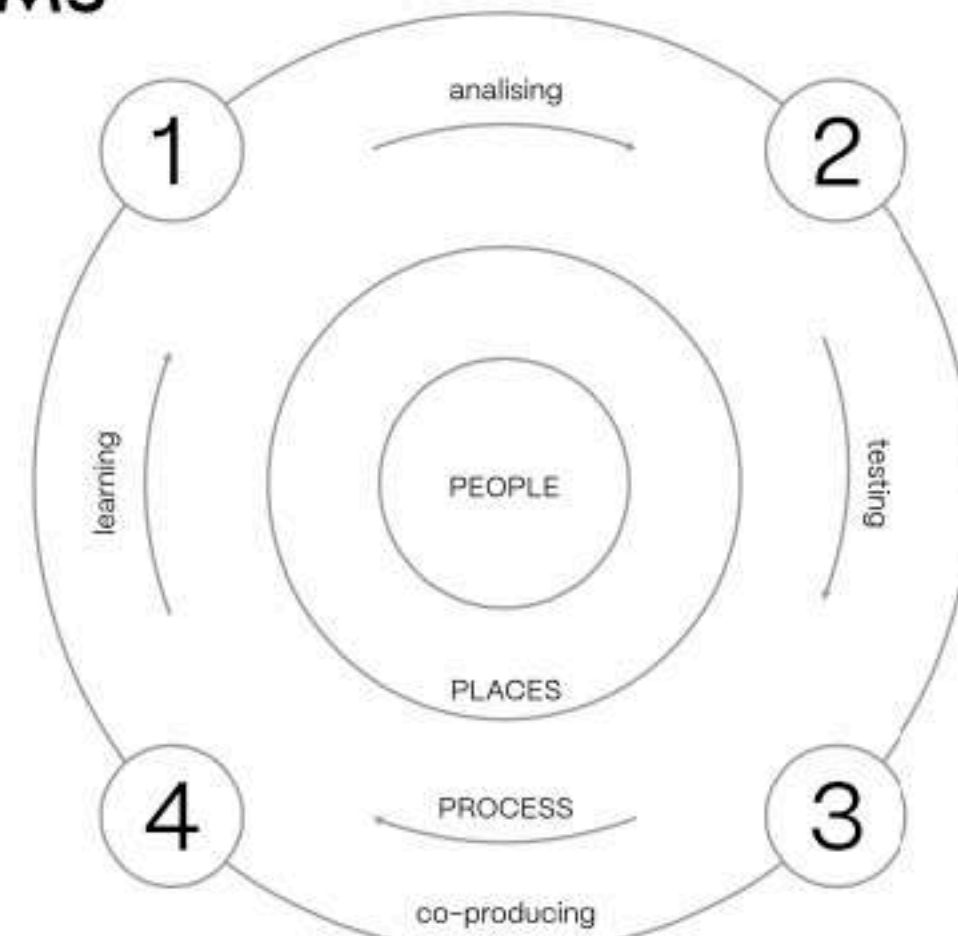


DIAGRAM 1. DATA DRIVEN APPROACH

PLACEMAKING ANALYSIS

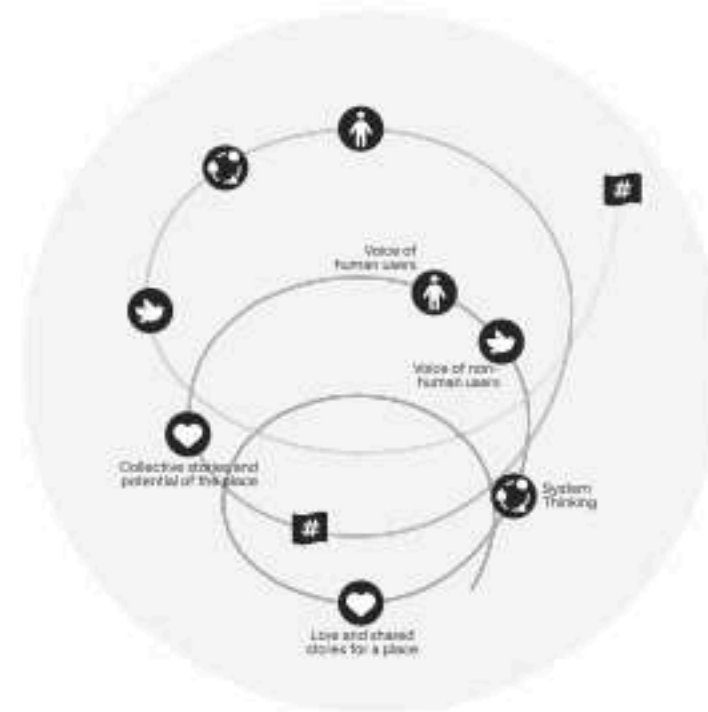
SYSTEMS



SENSORY



Sensory Mapping



The spiral of insights

Mapping local ecosystem, actors and interconnections.

- ✓ Rich endowment of natural and cultural assets
- ✓ Wide range of acquired assets
- ✓ A number of successful tourist product cases

CORE RESOURCES AND ATTRACTIONS

ENABLING ECOSYSTEM

- ✓ strategic prioritization by the State
- ✓ considerable efforts in talent development
- ✓ emerging brand positioning and promotion channels
- ✓ solid foundation laid through “islands of excellence” for future investments

DESTINATION MANAGEMENT

- ✓ Predominantly private-led efforts made in silos, great need for cooperation and alignment
- ✓ Substantial record in terms of international media mentions
- ✓ Poor efforts in tourist data analytics

COMPLEMENTARY CONDITIONS

- ✓ Predominantly private-led efforts made in silos, great need for cooperation and alignment
- ✓ Substantial record in terms of international media mentions
- ✓ Poor efforts in tourist data analytics

DEMAND CONDITIONS

- ✓ Great legacy and popularity in post-Soviet area
- ✓ Mostly associated with family/friends type vacations
- ✓ Emerging trends in eco-/adventure tourism
- ✓ High seasonality of visitor flow
- ✓ Limited niche specialization

PLACEMAKING ANALYSIS

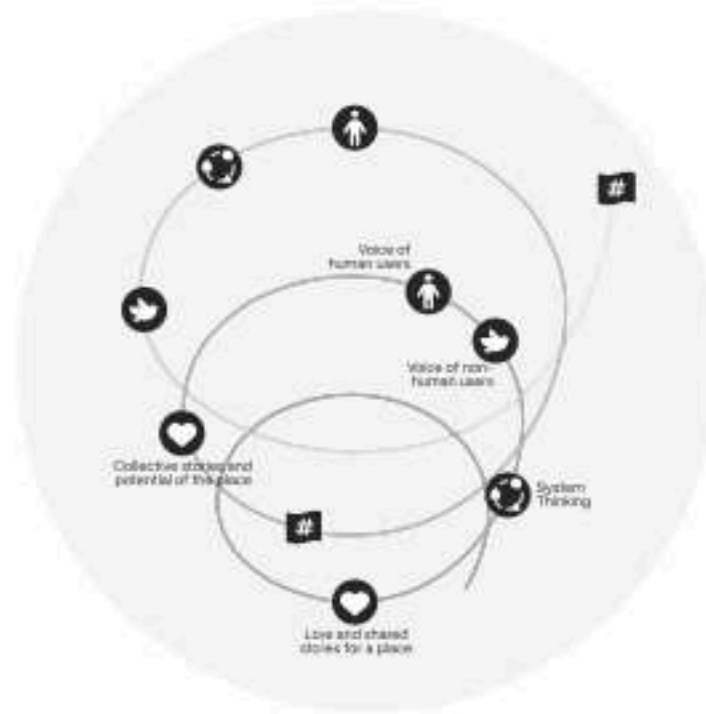
SYSTEMS



SENSORY



Sensory Mapping



The spiral of insights

Mapping arrival and stay experiences, influenced by prevalent colors, voices, city noise, etc

Landscape plays a key role in shaping how tourists perceive a place, starting from the very first perception up until mental images upon departure.



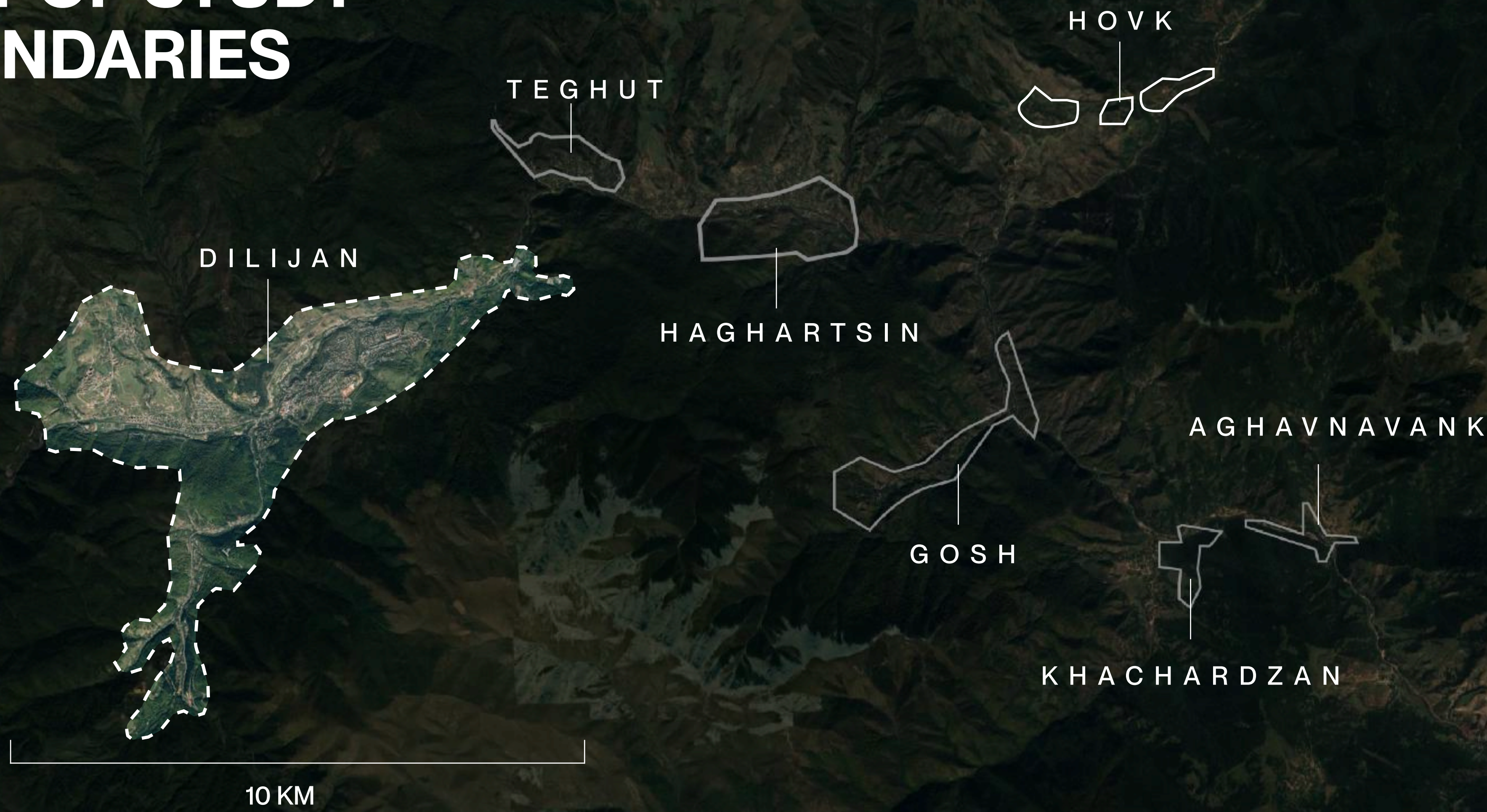
Experiences and sensorial exploration of the surrounding when walking, moving from one place to another, availability of public spaces, etc.



LANDSCAPE EXPERIENCE

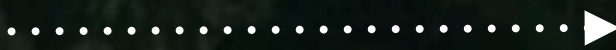
STREET EXPERIENCE

SNAPSHOT OF STUDY AREA BOUNDARIES



Extended Dilijan community is the essential touristic driver of Tavush region that includes the city of Dilijan and six rural settlements (Gosh, Haghartsin, Hovq, Khachardzan, Aghavnavanq, Teghut) since 2016.

Study and Cluster Vision development in frames of Dilijan Touristic Cluster Vision is set to the City of Dilijan / outlined in dashes/



CLUSTER CONCEPT DEVELOPMENT MANIFESTO

Changes in recent decade have transformed Dilijan as a community which now hosts both inherently local and relocated population diverse in their cultural backgrounds, life affiliations, and socioeconomic status.

One thing is for sure - Dilijan would continue to move forward. The challenge is to channel the “movement” that is sustainable, organic, and responsive to the historic heritage of this natural habitat.

The Cluster Concept and all recommendations hereafter were created to be respectful to the place, and in the meantime - holistic and competitive.

CHAPTER: #1

DILIJAN as a DESTINATION

ASSETS | TOURISTIC OFFERING | CHALLENGES | DYNAMICS

DILIJAN IS RECOGNIZED AS A KEY LOCATION WITH THE POTENTIAL TO DRIVE AND FULFILL ARMENIA'S NATIONAL CLUSTERIZATION STRATEGY.

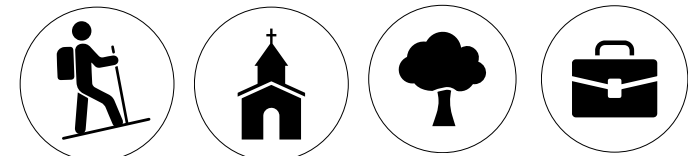
DILIJAN

Nature & Culture Cluster with potential to morph into world-class tourism destination with niche specialisations - eco, adventure, wellness.

NORTHERN ACCESS CORRIDOR



CENTRAL EXPLORATION ZONE



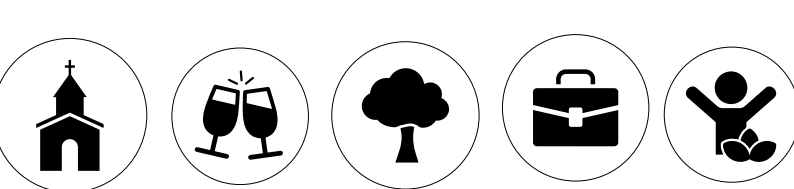
YEREVAN



WESTERN TOURISM BELT



SOUTHERN TOURISM BELT



KEY

CULTURE

ENTERTAINMENT

NATURE

ADVENTURE

BUSINESS

WELLNESS

4

ZONES

20

CLUSTERS

6

NICHES

Source: Dilijan Tourism Cluster Brief

DILIJAN: A JEWEL OF ARMENIA AND THE TAVUSH REGION

Nestled within the pristine Dilijan National Park—one of Armenia's four national parks—Dilijan is a true natural gem.



WHAT MAKES DILIJAN A DISTINCTIVE DESTINATION?

**DILIJAN
ASSETS
MAPPING**



1 PLACE

| scenery, history, architecture |



DILIJAN ASSETS MAPPING

1 PLACE

- Strategic location regionally, moderate accessibility and good level of isolation
- Synergy of Wild and Urban ambiance
- City spread out far and wide, crossing by Aghstev River
- City inside a National Park
- On the historic Silk Road
- On the Transcaucasian Hiking Trail
- Rich endowed assets both for relaxation and active exploration (ex., birdwatching, hiking)
- Mild and Humid Climate, with often rains and mists
- Crispy, Healing Air
- Nature & Wildlife
- Richness in water resources
- Proximity to unique historical attractions of the region (including Haghartsin and Goshavank)
- Resort town with decades long legacy
- Distinct Vernacular Architecture
- Historical Districts
- Preserved Soviet Modernistic Architecture
 - 50th Soviet Armenia Anniversary Star Monument
 - Amphitheater
 - Former Impulse Factory
 - Composer's House
 - Khanjyan Villa

2 PRODUCE

3 PLACES & EVENTS

4 PEOPLE & ICONS

1 PLACE

| scenery, history, architecture |



DILIJAN ASSETS MAPPING

2 PRODUCE

| signature, "own" products |



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2 PRODUCE

- Wild Collected Produce
- Endemic Herbs & Greens
 - Fruits (oriental apple, English wallnaut, European hazel, Caucasian pear, cherry plum)
 - Oyster Mushrooms
- Farm Produced
- Honey
 - Meat
 - Dairy
 - Eggs
 - Fruit Vodka
 - Mozarella for Export
- Intangible cultural Heritage
- Carpentry
 - Embroidery and needlework
 - Arts & Crafts

3 PLACES & EVENTS

4 PEOPLE & ICONS

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3 PLACES & EVENTS

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3 PLACES & EVENTS

- Museums and Galleries:
 - Dilijan Local Lore Museum and Art Gallery
 - Dilijan Museum of Folk Art (Sharambeyan Museum)
 - Money Museum of the Central Bank of Armenia in Dilijan
 - Sharambeyan Street (Tufenkian Heritage Hotels)
- Vevrev Rope park
- Dilijan Arts and Crafts Festival
- Dilijan Wine Fest
- Dilijan Woodland Feast - ?
- The Central Bank of Armenia's Training and Research Center
- Extension of AUA
- TUMO Branch
- Ayb School Branch
- UWC Dilijan, 1st international boarding school in Armenia
- Tourism Information Center
- Dilijan City Park
- Vevrev Rope Park
- Ditaran Cinema Dome
- Matinov's Water Memorial
- Rockwell Kent, American Writer
- Bronze Jar with ritualistic incrustations, found during archeological excavations in Dilijan. White ball statue replicating tis incrustations stands in the square of the administrative center

4 PEOPLE & ICONS

1 PLACE

| scenery, history, architecture |



3 PLACES & EVENTS

| scenery, history, architecture |



2 PRODUCE

| signature, "own" products |



4 PEOPLE & ICONS

| culture, famous, infamous |



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4 PEOPLE & ICONS

- Serik Davtyan, founder of Embroidery School in Dilijan and the author of a book on traditional Armenian embroidery
- Hovhannes Sharambeyan, local folklorist and painter
- Emma Tsaturyan, activist and foudner of City Choir School/Movement
- Vaghtang Ananyan, writer
- Eduard Mirzoyan, founder of Composer's Union Vacation House
- Arno Babajanyan
- Terteryan, wrote his famous music pieces living in Diiijan
- Shestakiovich, wrote music for Hamlet while in Dilijan
- Many famous residents and vacationers during Soviet Period (Plisetskaya, Saryan and many others)
- Woodworkers and Craftsman
- Dynasties of Musicians (Voskanyans, Ghazaryans, Ovsepyans)
- Jan Sharden, French traveller first mentioning Dilijan as a habitat in 17c.
- Caucasian Red Deer Breeding Center
- Deers and Bears
- King of the Forest by Ara Sargsyan
- Statue of Bears Family
- The Library, founded in 1908, named after Gh. Aghayan, traditional meeting place for intellectuals, writers, composers, and famous guests of Dilijan, as well as host for handcrafting club, reading club, and many others.

- Near proximity to the Capital Yerevan, on the crossroad of inner/international routes.
- Destination characterized by outstanding nature, resort heritage and cultural legacy.
- In the spotlight of Governmental efforts and private investors.
- Ingoing and international tourists visiting
- Existing and partially preserved architectural identity
- Starting thinking beyond mere accommodation, main stakeholders more in line with producing offerings around culture/value
- Existence of a City Council

- Get on board with growing global demand for Niche Destinations and Interests (Wellness, Culture, MICE)
- Capitalize on local produce and themes
- Instead of chain approach, foster a high-quality, targeted boutique hospitality (including conceptual boutique or heritage hotels, gastro-yards, food and beverage, arts and crafts)
- Urban Regeneration based on heritage-led mindset
- Rethinking, applying practical creativity in master planning to create inner variety of “centers” as energy spots in each disconnected district
- Connect quality of products and the destination experience
- Open to explore new, different from established stereotypical perception of what Dilijan has to offer



- Peculiarities of terrain that challenges walkability, disconnection of districts and unified perception of a town.
- Shortage of local professional resource in number of areas (from hospitality service to management)
- Interrupted, abandoned urban face of the town
- Not prioritizing a strategic master planning aiming at homogenous urban identity development
- Touristic offering/packages lack wholeness (ex., objective potential for hiking is not maintained 360)
- One-sided, stereotypical view of Dilijan = Nature
- Limited pedestrian-oriented streetscape experiences

- Overcrowd with general/trivial offerings that will kill the enchanting vibe
- Disappearing historic fabric and historic integrity of architectural heritage
- New properties to be built architecturally non-sympathetic to the existing style of the city
- Uncontrolled and massive developments resulting in extra burden on city facilities and causing major environmental damages
- Concentrate merely on nature-given assets
- Overlook untapped, previously sought after components, as gastro-, water resources

Dilijan uniquely blends untouched beauty with urban life, enriched by a rich tapestry of historical and cultural heritage.

CAN DILIJAN LEVERAGE AND DIVERSIFY THE EXISTING TOURISTIC LANDSCAPE OF ARMENIA?

THERE ARE STEADY TOURISM MARKETS, WITH DIASPORA AS AN IMPORTANT SUB-SEGMENT, AND GULF COUNTRIES AS NEWER MARKETS.

SHARED BORDERS WITH GEORGIA ARE A GREAT, YET UNTAPPED SOURCE, FOR REGIONAL TOURISM BOOST.

Diaspora visits account for the third of the flow. The diaspora group is made up of almost entirely cultural tourists as both “early” and “recent” diaspora groups desire to reconnect with personal / family heritage. Almost 50% of diaspora tourists stay with their family and friends during their trips to Armenia.

Potential tourists see Armenia as a culture rich, welcoming country with attractive scenery and UNESCO heritage sites, with cultural and natural assets attracting about 70% of the total international flow.

TOURISM ARRIVALS BY COUNTRY (TOP 5)

IN THOUSAND , 2023

	2019	2022	2023
 RUSSIA	659	790	1.140
 GEORGIA	257	175	254
 IRAN	124	116	151
 USA	57	51	59
 GERMANY	37	24	28

TOURISM TYPES, 2023

HOLIDAY & LEISURE	55.4%
BUSINESS	27.5%
EDUCATION	0.1%
MEDICAL/ WELLNESS	1.1%
OTHER	15.9%

100%

Source. Statistical Committee of the Republic of Armenia, 2023

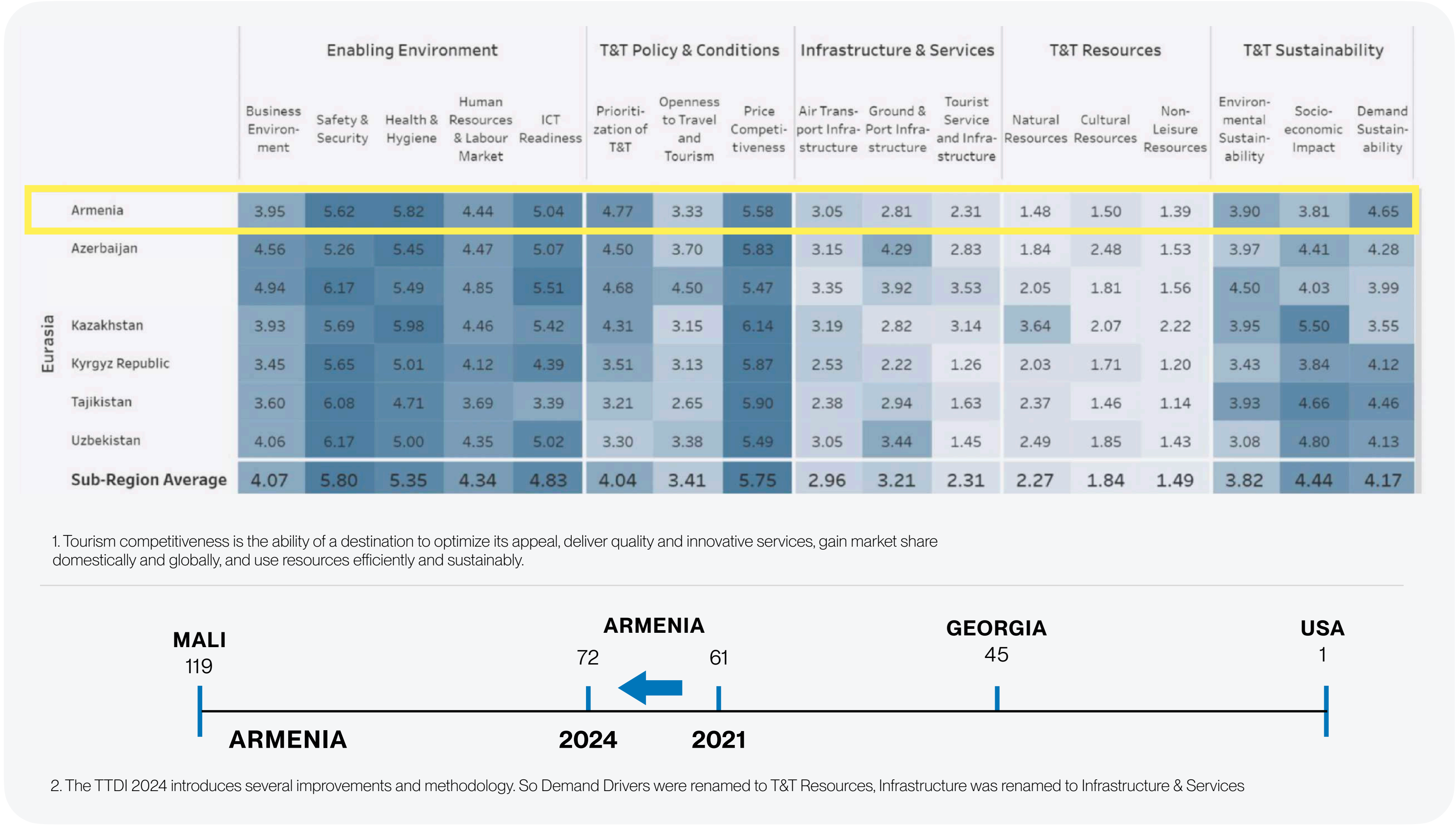
DESPITE ALL THE EFFORTS AND ACHIEVEMENTS, ARMENIAN TOURISM INDUSTRY STILL LAGS IN COMPETITIVENESS ¹, ESPECIALLY IN T&T RESOURCES AND INFRASTRUCTURE ²

In terms of the country's tourism offerings, there are still significant steps to be taken. According to the latest World Economic Forum's 2024 Travel & Tourism Development Index (TTDI), Armenia ranks 72nd out of 119 countries. This represents a drop of 9 places compared to the 61st position in 2021.

Armenia ranks high in health and hygiene standards, ensuring safety and well-being for tourists and boosting its appeal as a safe destination.

Armenia needs to improve its management of natural and cultural resources, ranking 110th and 86th in the 2024 Travel & Tourism Development Index. Key areas for improvement include infrastructure, particularly roads and transportation to tourist sites, and the quality of hospitality services, which require national training programs to meet international standards.

Source: World Economic Forum, Travel & Tourism Development Index, 2024



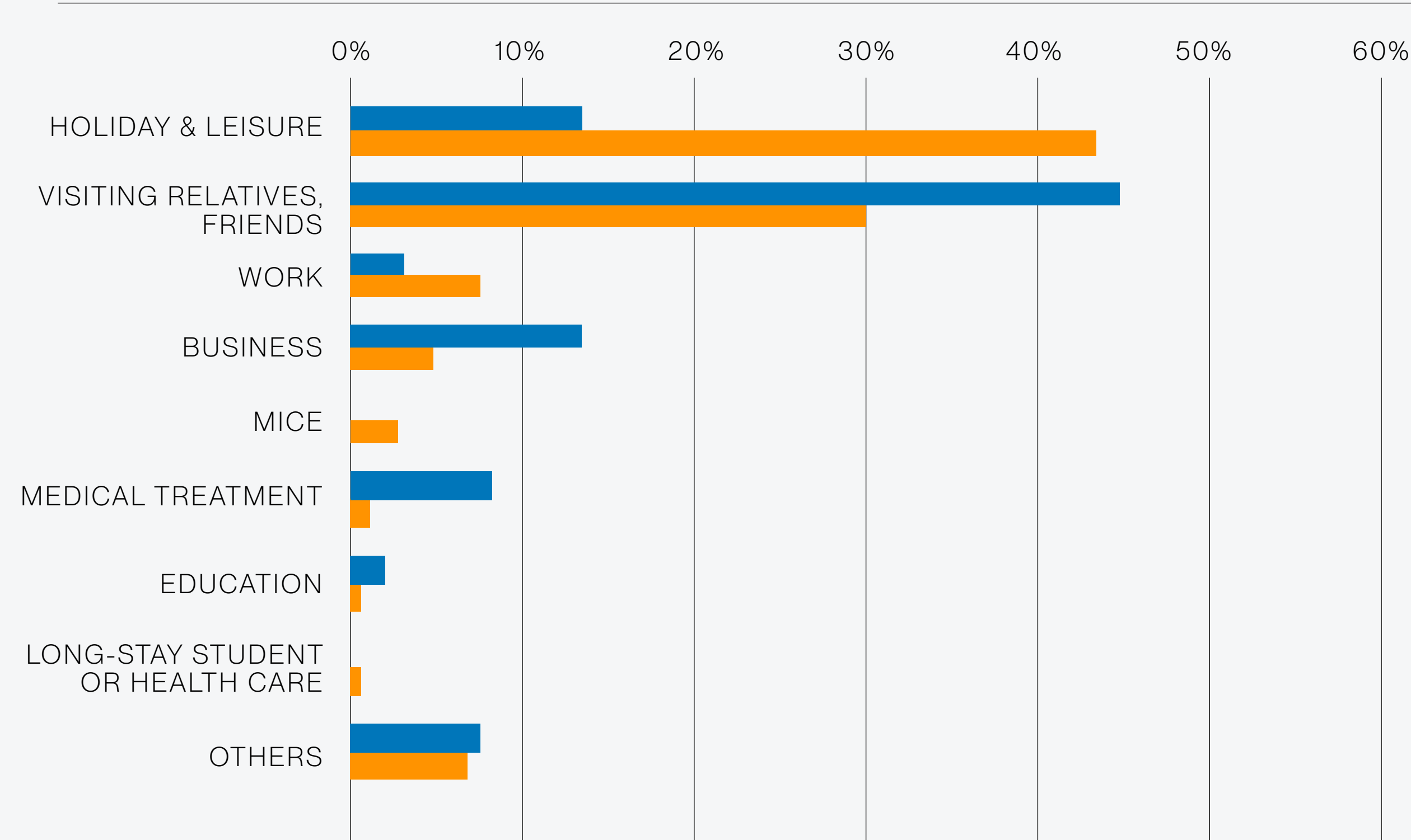
“
"Holidays and Leisure" was the main purpose for 43% of visitors, a significant increase from 14% in 2013.

Although leisure tourists as the highest spenders, their short stays limit potential revenue. Average daily expenditure is relatively low, at approximately US\$ 51.9, particularly among non-package tourists.

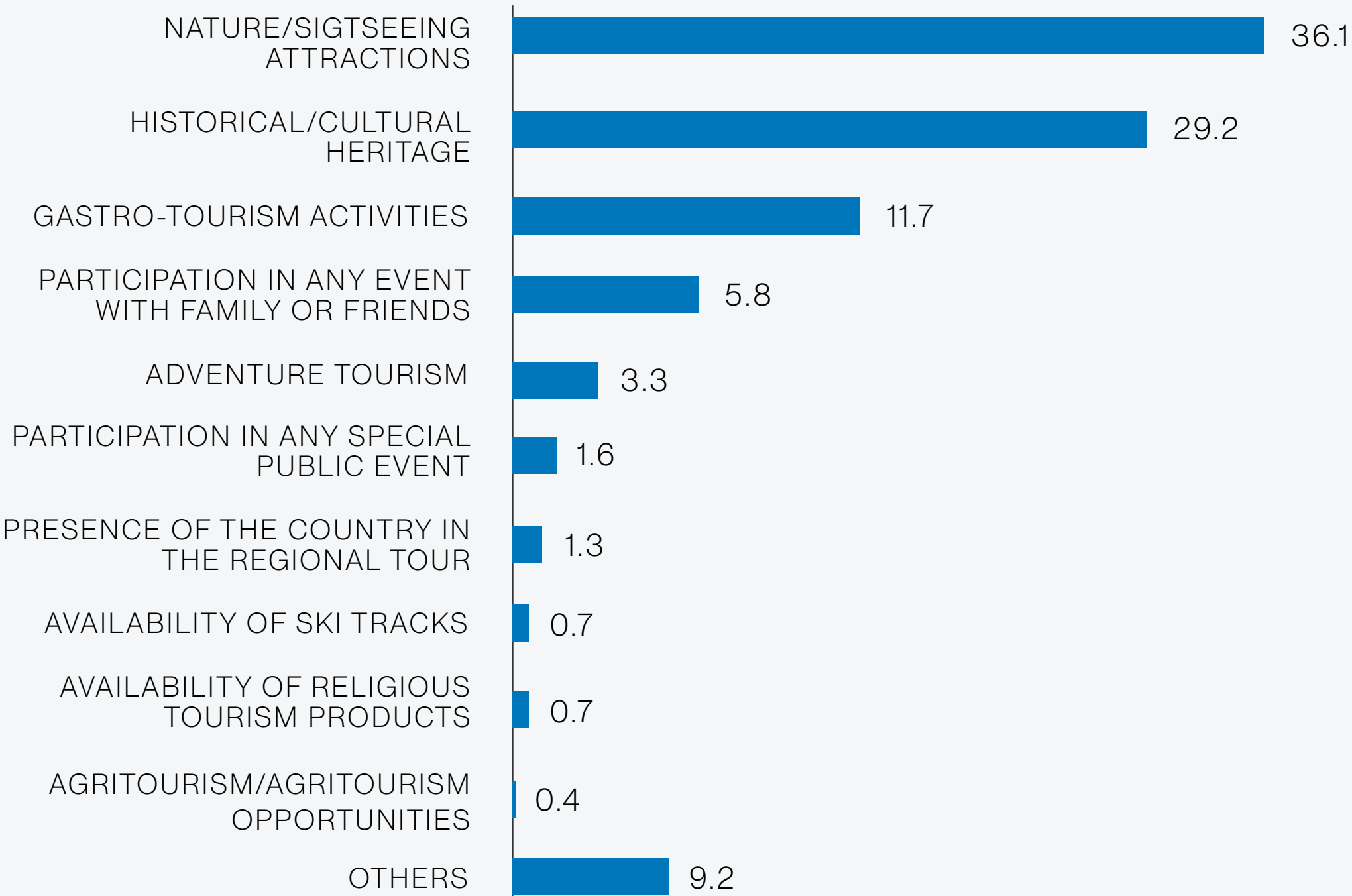
Among leisure tourists, nature/sightseeing is the top motivation for choosing Armenia (36.1%), followed by historical/cultural heritage (29.6%) and gastro-tourism (11.7%), mainly among top European markets. The development of this segment would also promote off-season attractions and events to extend the tourism season, as data collected shows a tourism concentration in the central quarters of the year. Armenia should develop niche tourism products such as wine tourism, adventure tourism, and wellness tourism and creating itineraries that combine Armenia's diverse attractions.

Source: International Visitor Survey on National Level, 2024

PURPOSE OF VISIT IN %



REASONS FOR CHOOSING ARMENIA AMONG TOURISTS IN %



DILIJAN HAS THE FULL POTENTIAL TO FULFILL THESE TOP THREE MOTIVATIONS AND OFFER MORE REASONS TO VISIT,

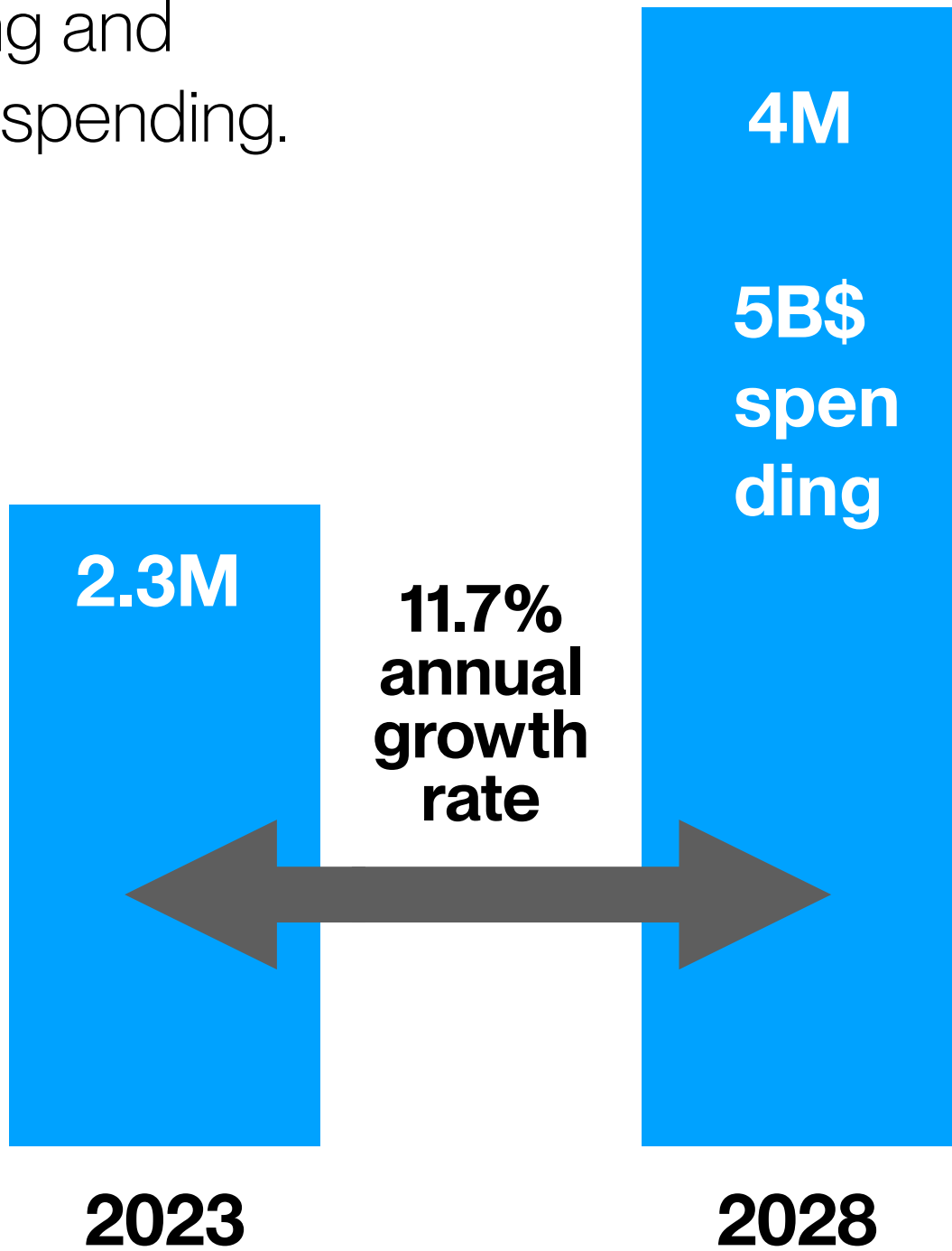
**BUT IT CURRENTLY DOES NOT SERVE AS A
PRIMARY CHOICE FOR TRAVELERS TO ARMENIA.**

VISITOR FLOW IS:



STATE STRATEGY FOR TOURISM AIMS
FOR **11.7% ANNUAL GROWTH RATE**
IN INTERNATIONAL VISITS AND
SPENDINGS.

Meanwhile, the limited availability of high-end tourism products and the concentration of visitors in Yerevan restricts tourism offering and regional distribution of spending.



Source: International Visitor Survey on National Level, 2024

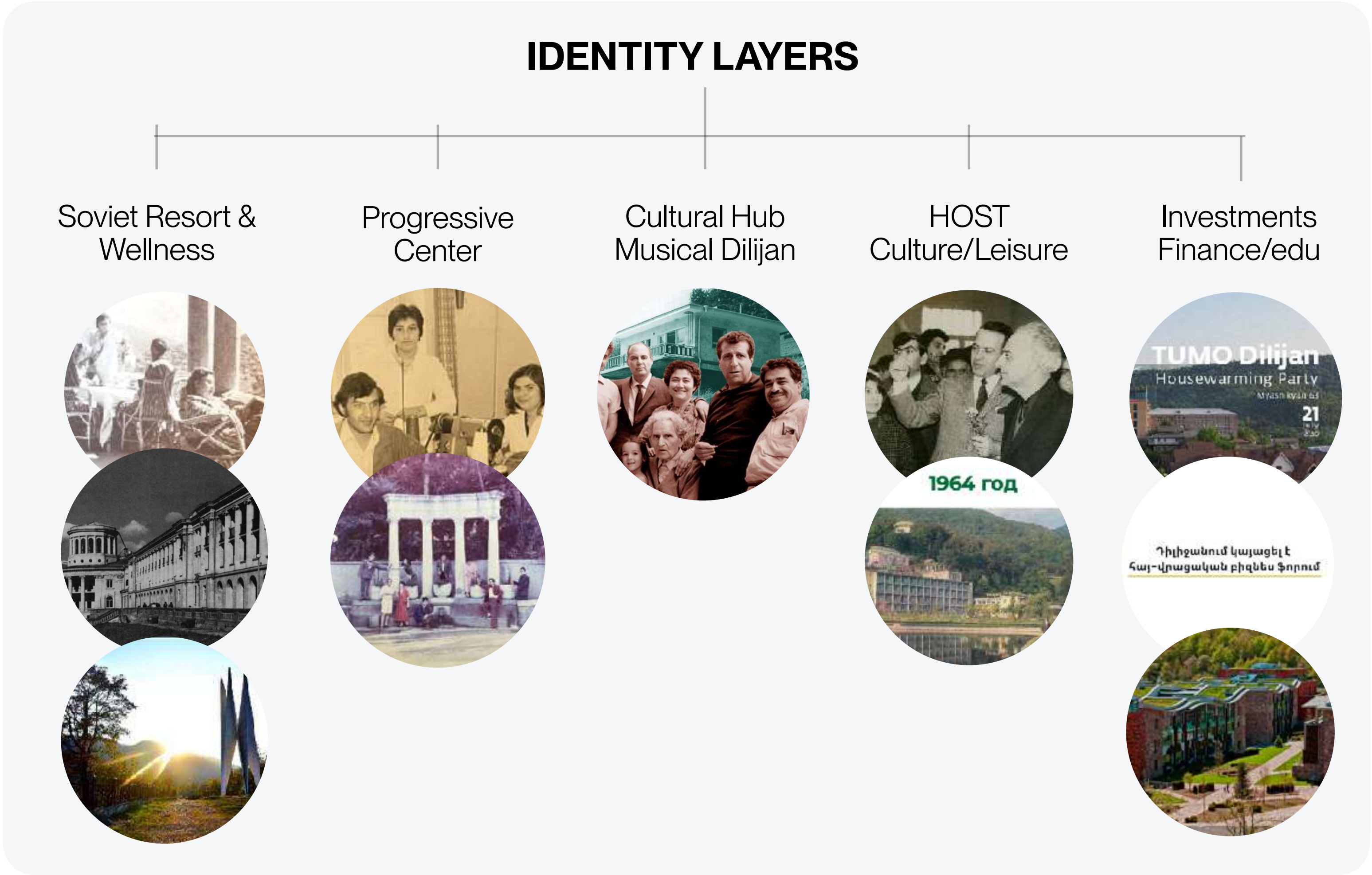
For this to take place, Armenia should develop niche tourism products such as wine tourism, adventure tourism, and wellness tourism, creating multi-destination itineraries and thematic routes that combine Armenia's diverse attractions.



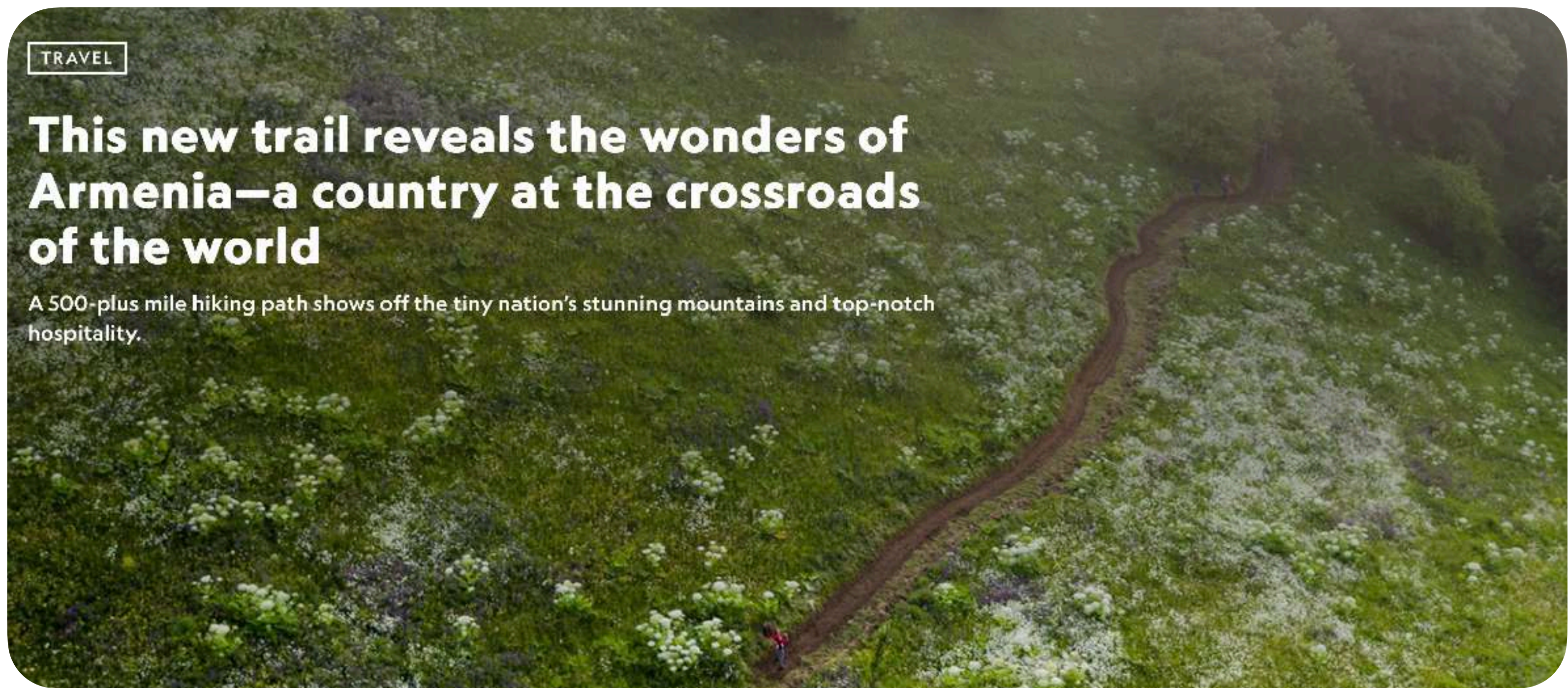
TODAY,
**WHAT IS DILIJAN'S
TOURISTIC OFFERING?**

APART FROM ITS STUNNING NATURE, DILIJAN REMAINS A POPULAR TOURISTIC DESTINATION THANKS TO VARIOUS FACTORS:

- SOVIET LEGACY/HERITAGE
- AN INTERSTATE/INTERREGIONAL TRANSPORT CORRIDOR.
- A “LABORATORY” FOR PILOTING/ TESTING COUNTRY-WIDE URBAN DEVELOPMENT INITIATIVES.
- ANCHOR INVESTMENTS IN EDUCATION AND INFRASTRUCTURE.



IN TERMS OF GAINING RECOGNITION IN INTERNATIONAL MEDIA, DILIJAN APPEARS WITHIN **THE BROADER NARRATIVE OF ARMENIA, PARTICULARLY IN THE CONTEXT OF THE TRANSCAUCASIAN TRAIL (TCT)** AND THE GLOBAL MOVEMENT OF “GOOD, YET UNDISCOVERED” PLACES.



TRAVEL

This new trail reveals the wonders of Armenia—a country at the crossroads of the world

A 500-plus mile hiking path shows off the tiny nation’s stunning mountains and top-notch hospitality.

<https://www.nationalgeographic.com/travel/article/armenia-trail-ancient-churches-hiking>

Forbes

Here’s Why Armenia Is Emerging As The Next Food And Wine Travel Destination



Hiking Armenia’s New Transcaucasian Trail is a Beautiful Way to Immerse Yourself in Armenian Culture

Ten Places That Deserve More Travelers



Five Captivating Natural Wonders To Visit In The Caucasus

How Armenia Plans to Become the Next World-Class Hiking Destination

TOURISM SPECIALISATIONS

Main areas exploited to drive the touristic flow is positioning Dilijan as a hub for eco-, adventure-, and cultural tourism mainly engaging historical monuments and sites.

ESTABLISHED

EMERGING

UNSTAPPED

Historic

Ecotourism

Wellness

Adventure

MICE



Nature

According to GotoDili, Dilijan can be considered the most accessible tourism city in Armenia: 1 hiking route for challenged people, 1 virtual city tour for deaf people in 3 languages, and 1 virtual visitor center developed for deaf people in 3 languages.

PARADOX

NATURE IS THE MAIN DRIVER,
YET INTERACTION WITH NATURE
IS STILL LIMITED

REPRESENTATION

While it's tempting to present Dilijan through a cultural lens due to its rich heritage, the modern cultural scene is currently limited, with the focus mainly on historical and religious sites.



THIS NO
LONGER
EXISTS

THE NARRATIVE SHOULD
TRANSITION FROM MYTH
TO PRESENT-DAY

REASON TO VISIT

Visitors are mainly drawn by nature, yet passive stay is common. Gastronomic experience is the inseparable component of the experience.

LOCALS

a brief, refreshing stay: “weekend tourism” especially from YVN

eat, drink, unwind, which usually takes place away from nature

enjoy the scenery

INTERNATIONAL

stopover while interregional/ interstate journey

combined destination when visiting Tavush

attending events or visiting someone

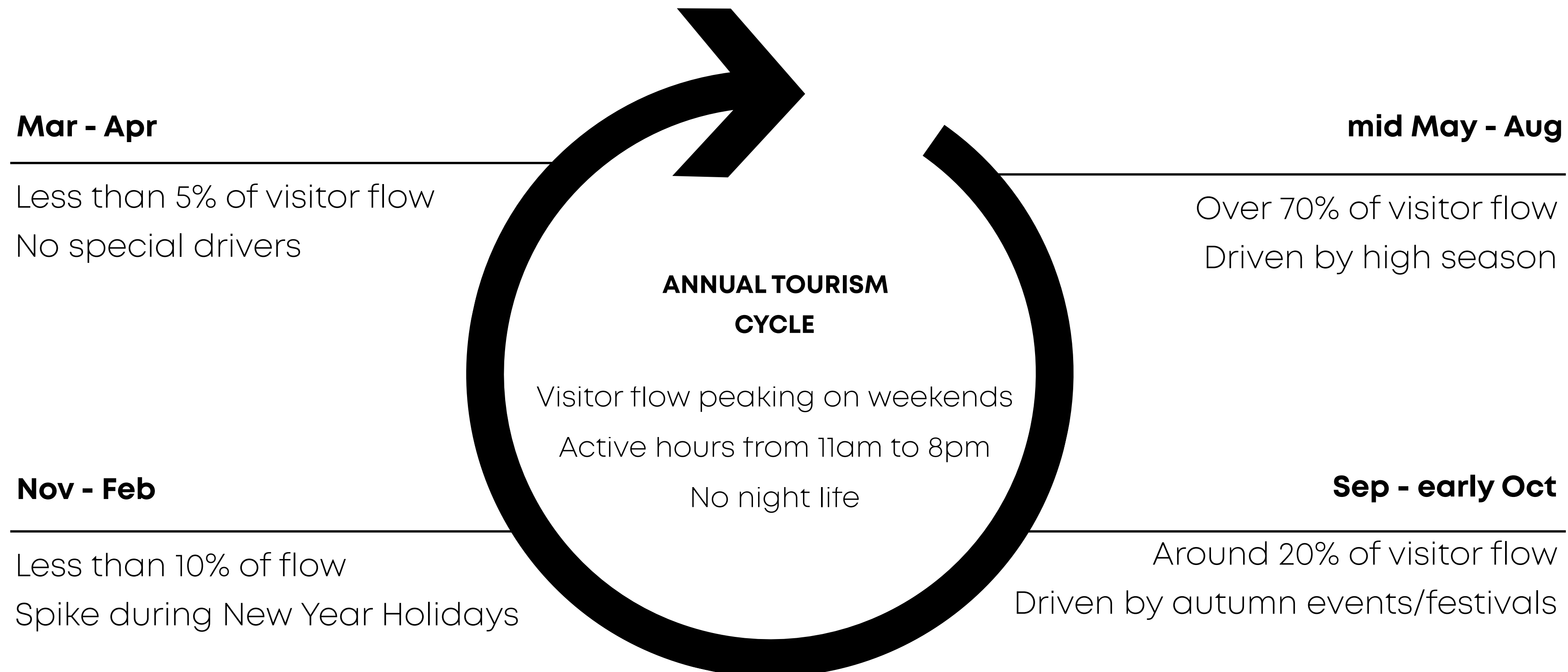
adventure, mostly hiking enthusiasts

UNEVEN VISITOR FLOWS

Visitations are highly seasonal that disrupts the sustainable growth and quality control of hospitality ecosystem.

The peak season is generally from mid-May to September, with **July-August being the busiest for most hotels**. Some hotels also see spikes during New Year holidays (ex. Dilijan Resort).

Festivals and local events (notably wine and gastro events) are strong influencers, boosting both visitor numbers and pricing. Events drive much of the tourist activity in the area.



MAPPING THE OFFERINGS SHOWS LIMITED INTEGRATION OF AVAILABLE RESOURCES/ASSETS IN THE FINAL TOURIST PRODUCTS/SERVICES



TOP 3 POPULAR CHOICES:

According to GotoDili Organization



CURRENT TOURISM OFFERINGS

OVERVIEW

Tourism value chain dominated by standard economy class offerings/facilities

No proper value proposition for visitors interested in luxury leisure activities

No night life or evening entertainment

Lack of man-made spaces/experience

Predominance of less sophisticated tourist activities that require less time, i.e. dining, visiting a limited set of natural/cultural landmarks

No niche specialization by age groups

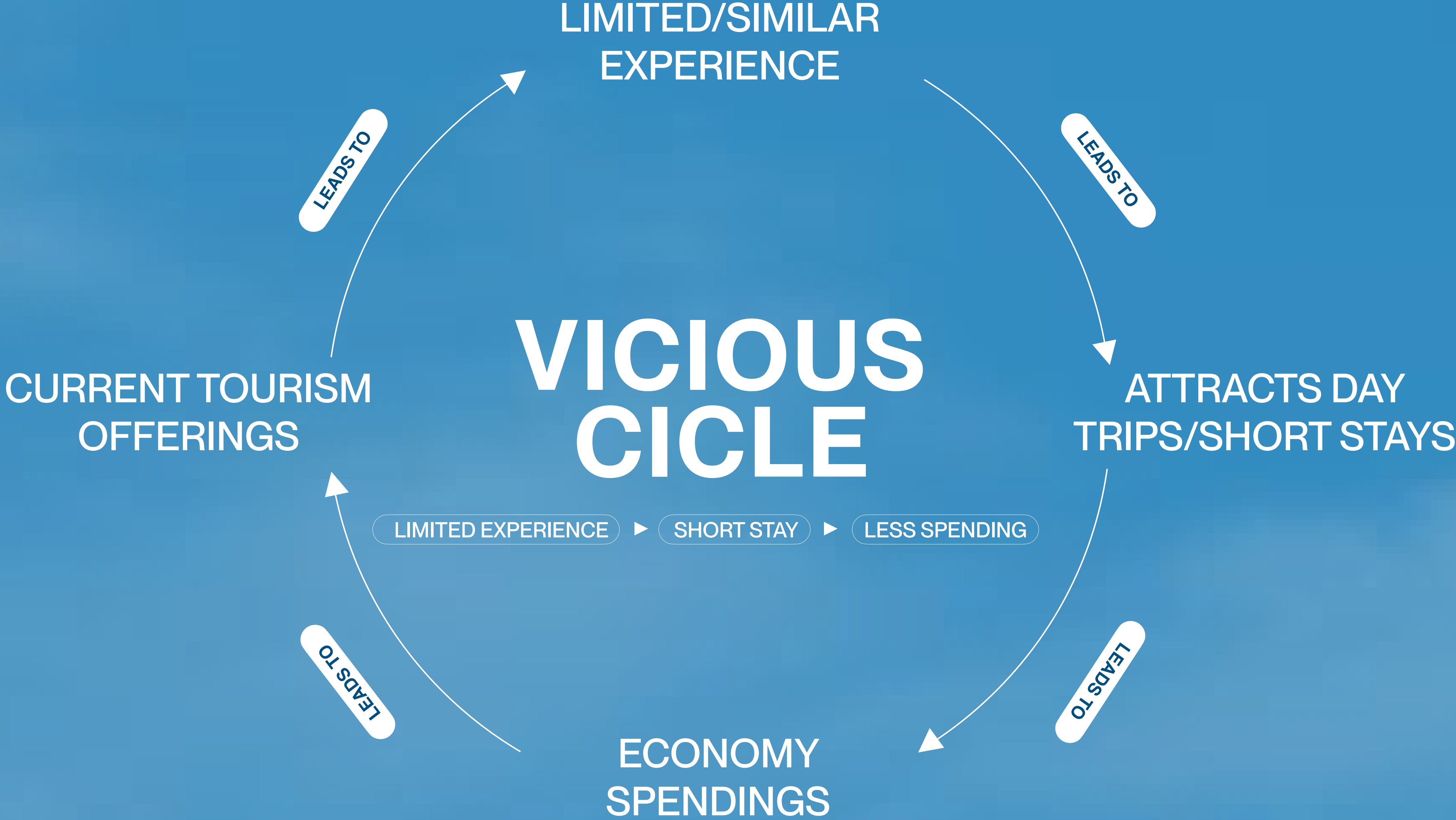
Limited interaction with nature when staying in the town

Underdeveloped offering infuses feelings of insecure (ex., emergencies, guidance while hiking)

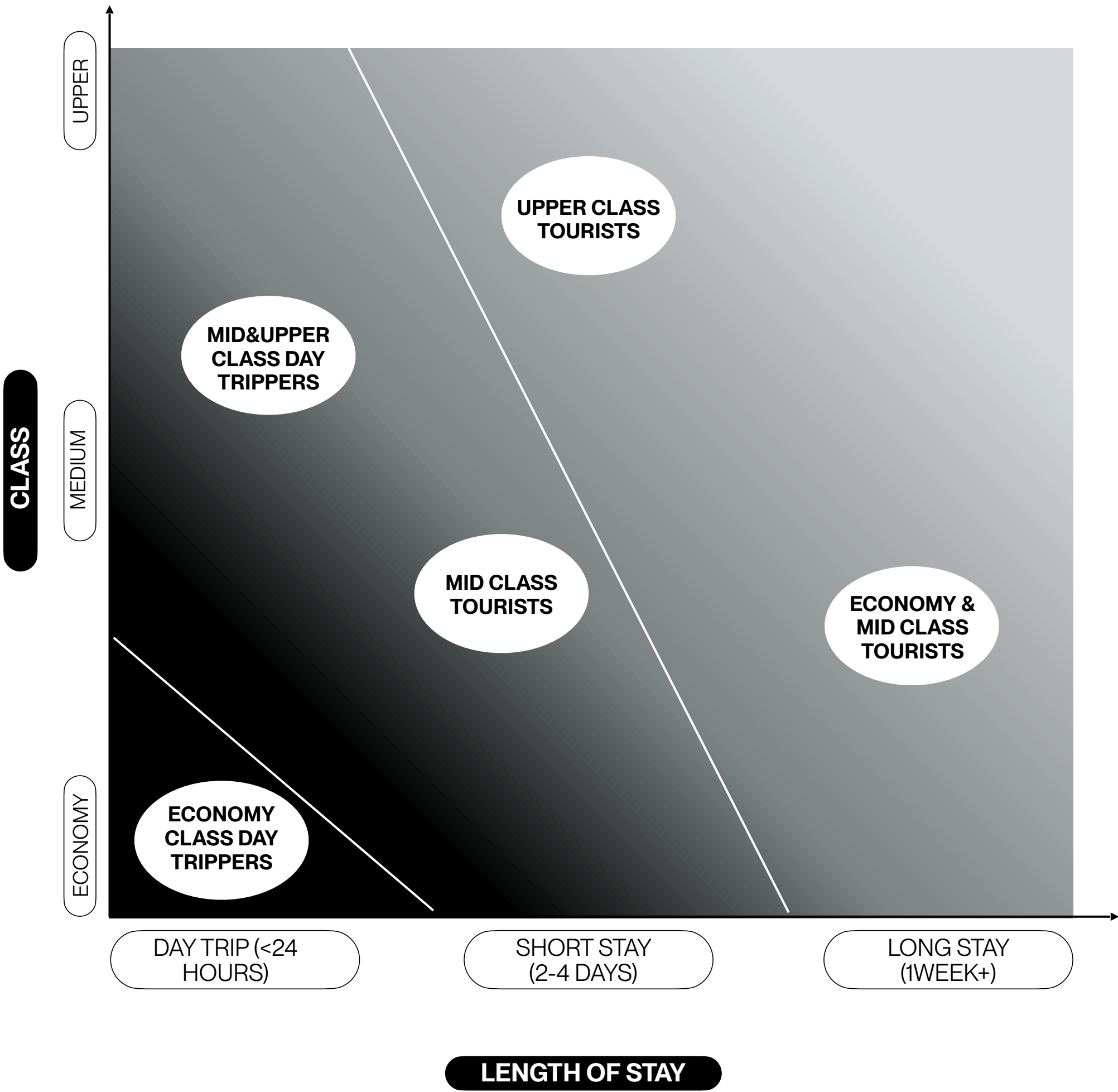
High dependence on weather conditions/seasonality

High spatial concentration of restaurants/entertainment activities

Similar gastronomic propositions



MAPPING OF DILIJAN VISITOR PROFILE



STAYING SHORT SPENDING LESS

#visitors per year

~500 000K

Average stay

1-3 days

VISITOR RATIO

The ratio varies depending on the hotel, yet in average locals represent a larger share of visitors.¹

30-50% 50-70%

International Local

PREVALENT GEOGRAPHY²

🇷🇺 Russia 🇩🇪 Germany 🇫🇷 France

VISITOR PROFILE

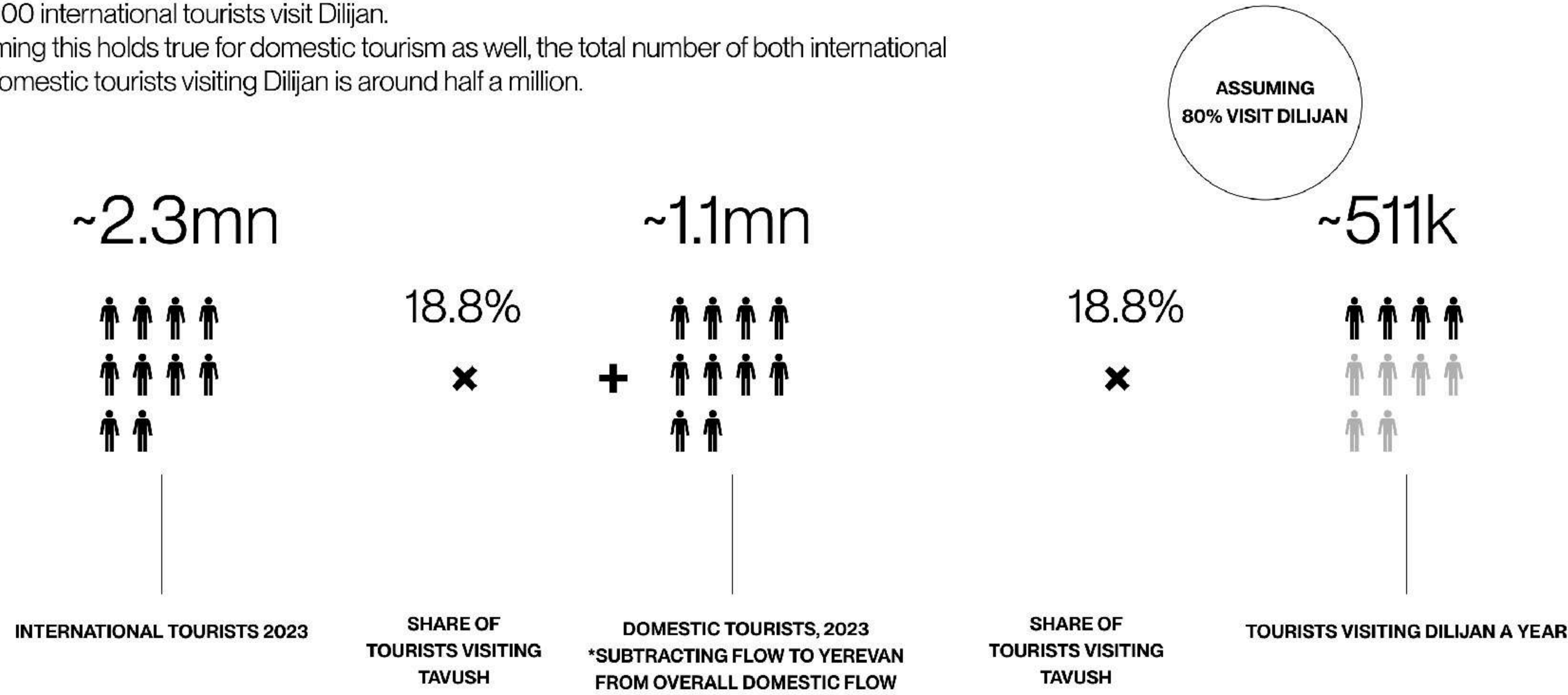
Families, groups (private/business), individual/groups hikers

1 Hotel Questionnaire, 2024 2 TIC Tourist Statistics (2018-2024)

DILIJAN TOURISTS FLOW

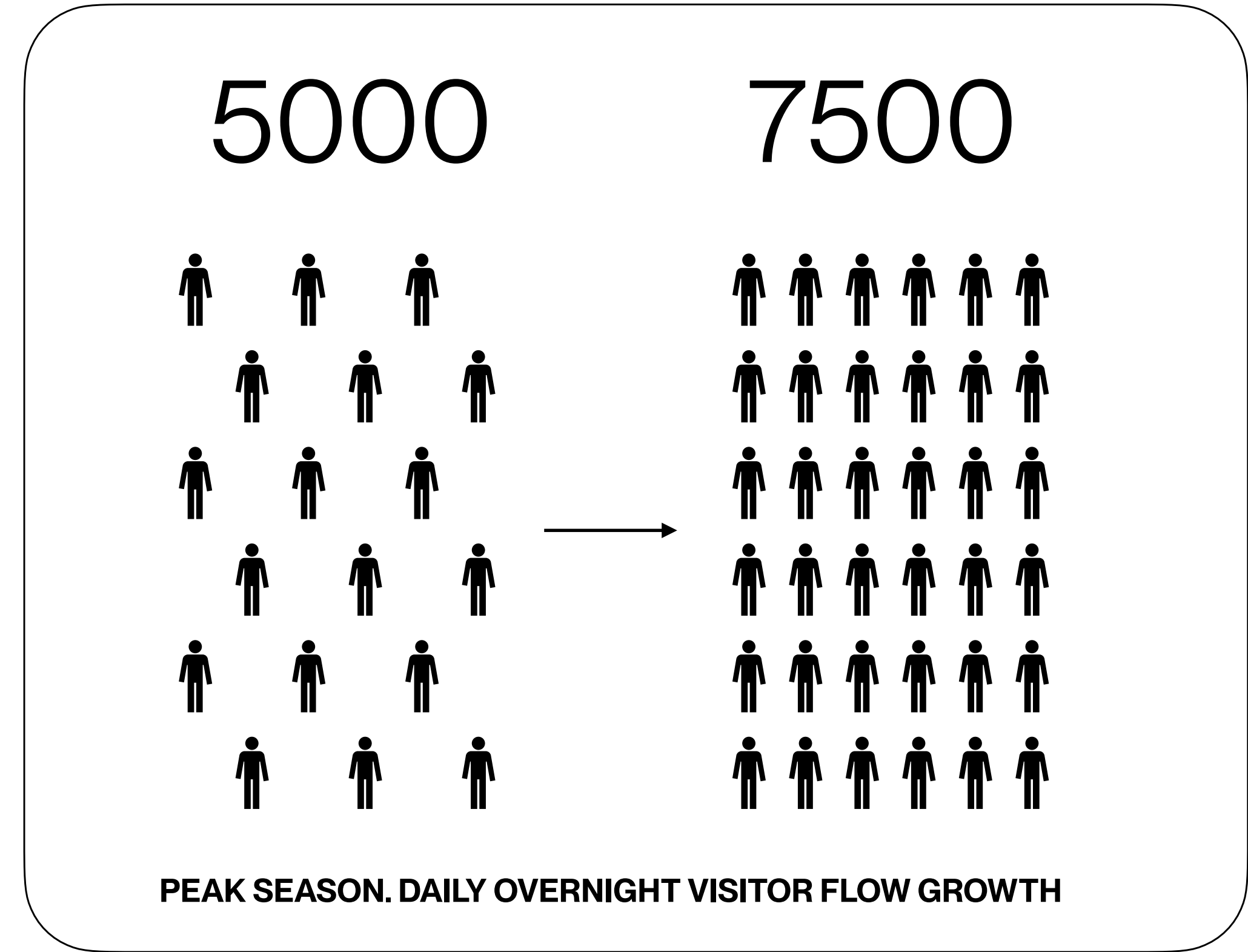
According to the 2023 Armenian International Visitor Survey, 18.8% of international tourists visit the Tavush region. Assuming that 80% of those tourists also visit Dilijan, approximately 346,000 international tourists visit Dilijan.

Assuming this holds true for domestic tourism as well, the total number of both international and domestic tourists visiting Dilijan is around half a million.



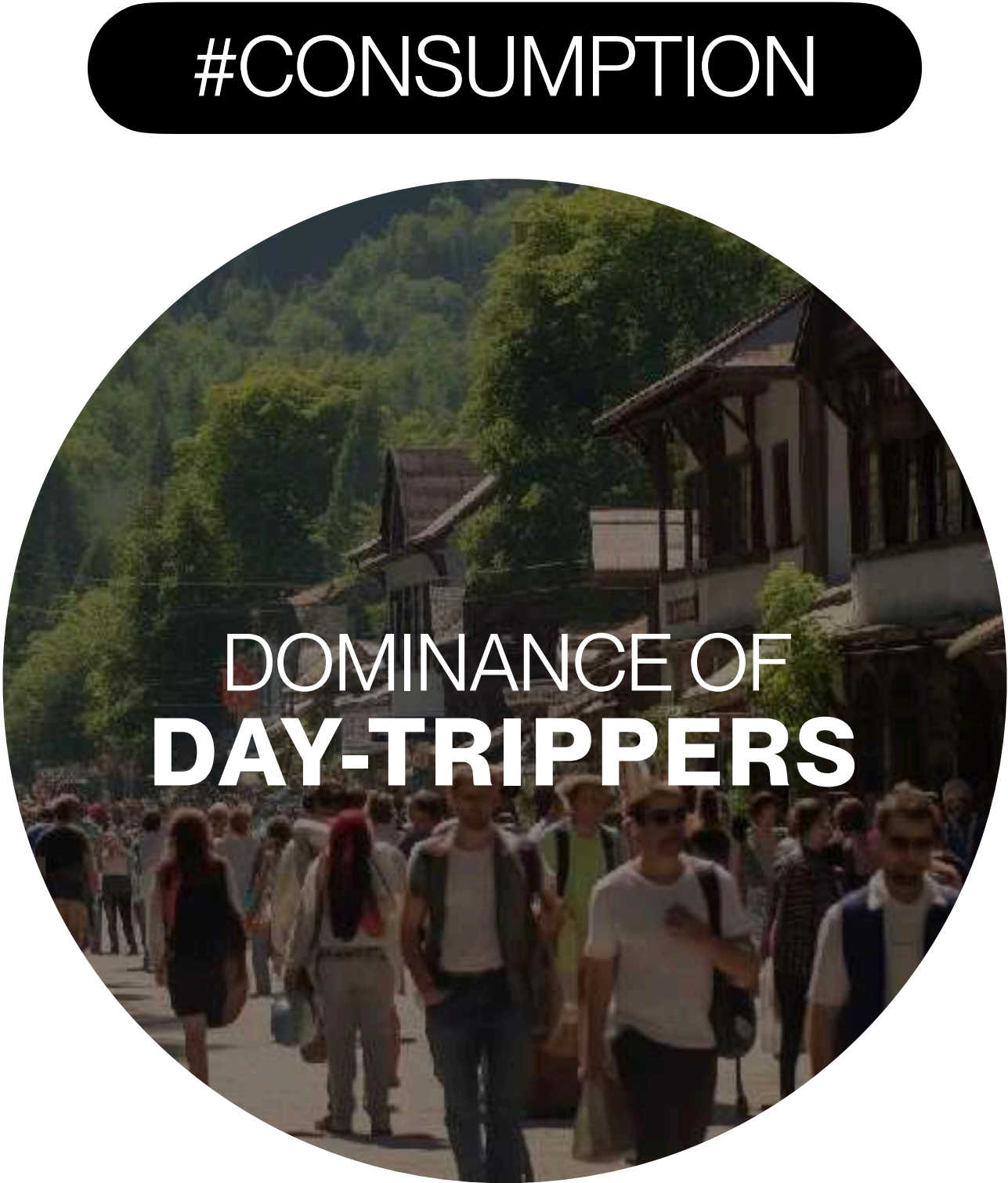
PROJECTION

Pipeline projects reinforce similar growth trajectory - leveraging endowed assets, simplified value propositions, and localization within relatively developed areas aimed at high profit margins. Within 5 years, this can increase daily visitation.



THREATS

Escalate day-tripping - overcrowd locations, boost mass tourism due to simplified value propositions, posing a potential threat to the natural vibrancy of the location, meanwhile due to poor urban connectivity, destinations that are far from the main concentration, will literally remain unobserved.



LOCALS & EXPERTS HAVE CONCERNS

FEAR OF LOSING
THE SENSE OF PLACE

NEGLECTED
NATURE

CONSUMERISM OVER
VALUE CREATION

LIMITED PERSPECTIVE
FOR LOCALS

“ Would be good if they didn't put a cafe or a hotel at every corner, and at least would keep the main style, that the town has, for it to develop in the same way

“ And it's just the contrast - like the campus, which is very developed and those very old buildings. ... some things are very, very developed, but like some areas not at all. like some two different worlds

“ **Nowadays, new buildings, hotels have different styles, there is no person that would coordinate and guide, telling that they can't use whatever style they like**

“ **Everyone comes here for the nature, no-one comes for a man-made environment**



“ **If the tourism is all about operating a hotel or a restaurant, then it's a trap for young people. They go after high salaries and think less about education.**

“ It's a good thing that we have Dilijan, that we can go ahead and use, because it shouldn't happen that we use it and give nothing in return. I don't mean jobs in the service sector, I mean having some positive influence in the community.

“ **This place should not be associated with a regular place for dining or lodging**

“ **... The architectural appearance of Dilijan is very important for us: wooden, warm colored, tile roofs are very unique to Dilijan.**

“ I would be really upset if it turn into the second Tsaghkadzor

LOCALS & EXPERTS HAVE ASPIRATIONS

~~CONSUMPTION~~
CREATION

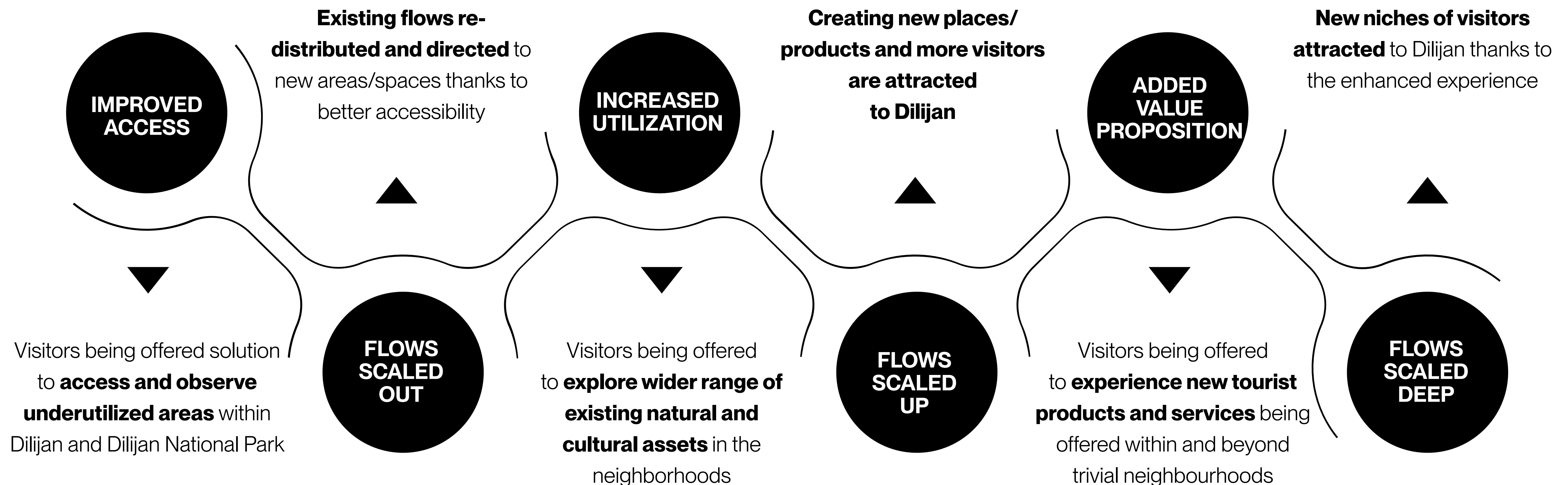


VALUE CREATION
OVER CONSUMERISM
REVIVAL OF DOMINANT
CULTURAL NARRATIVE

BACK TO

THIS MEANS
**DILIJAN NEEDS
TO REFOCUS ITS
GROWTH TRAJECTORY**

GET OFF THE DAY-TRIPPING GROWTH TRAJECTORY, SO DILIJAN TOURISM CLUSTER WILL SCALE



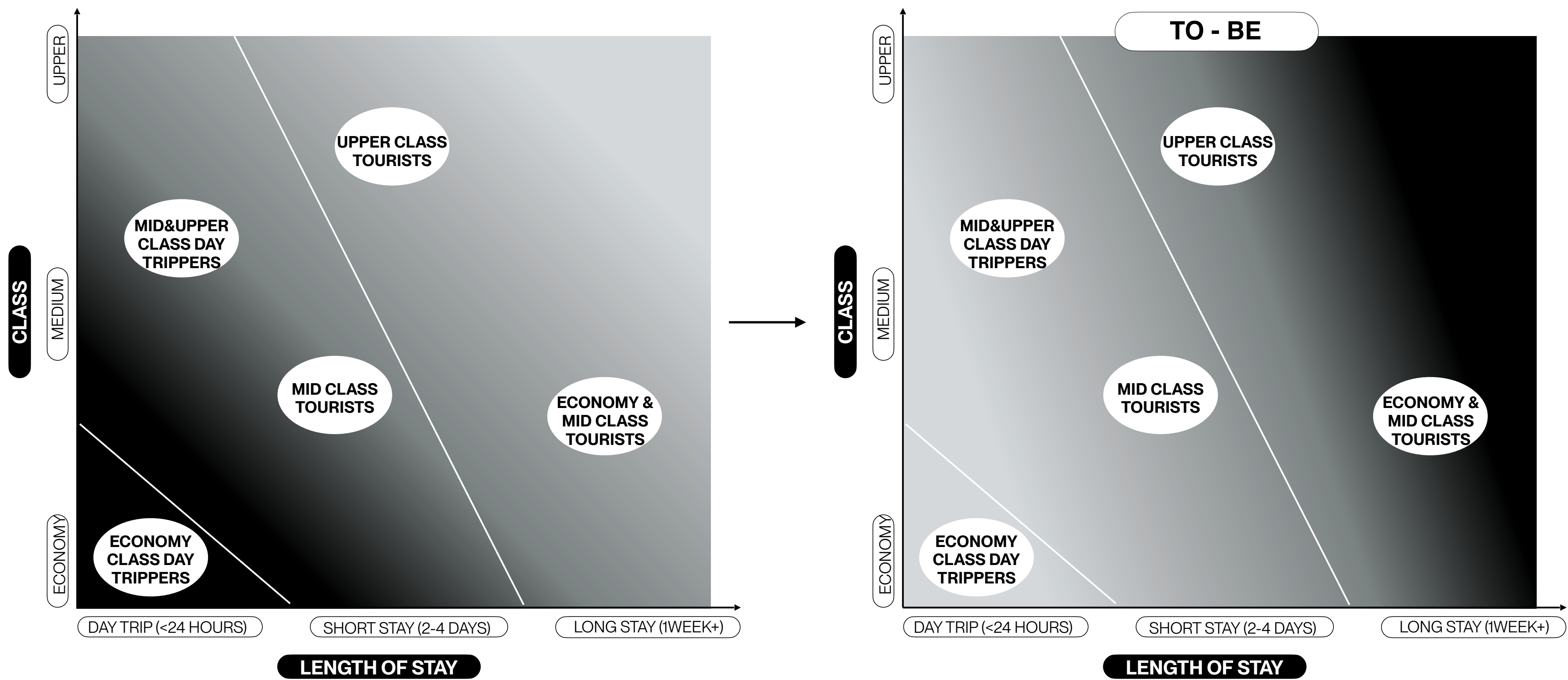
NEW FACES IN TOWN THAT STAY LONGER

Dilijan requires innovative, yet authentic offerings, enticing visitors as a primary reason to visit. This transformation not only involves **attracting more advanced travelers but also prolonging their length of stay.**

Targeting new audiences with refined aspirations will be crucial for achieving shift in Dilijan's tourism landscape.

***advanced travelers**
term refers to people who do not perceive themselves as classical “tourists” having additional interests and needs, willing to spend more on experiences, combine business with leisure.

TRANSFORMATION OF DILIJAN
VISITOR PROFILE



THIS MEANS

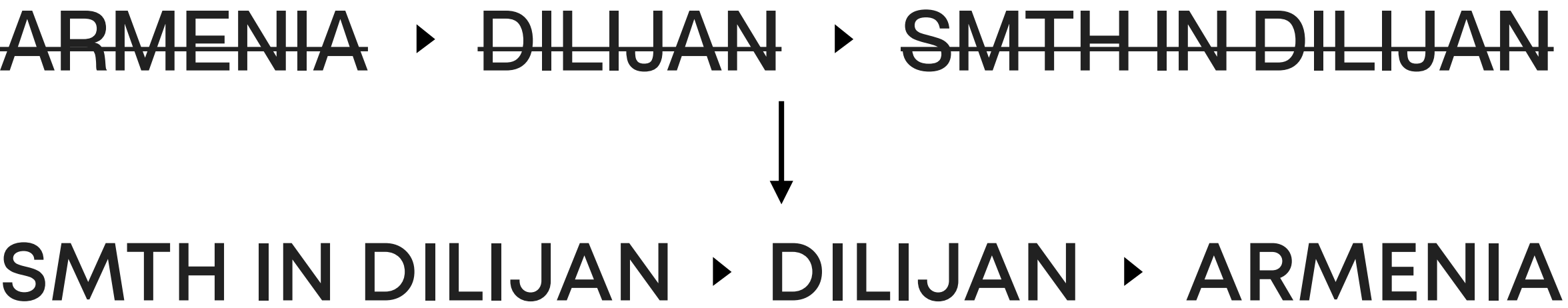
**KEEP LEVERAGING THE
ENDOWED ASSETS, YET
CREATING NEW ONES**

BENCHMARKING SHOWS THE KEY TO BUILDING SUSTAINABLE DESTINATIONS:

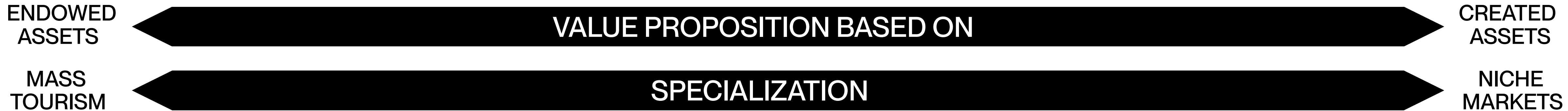
a sense of place is reinforce through authentic lifestyles & infrastructures, maintaining a robust architectural and cultural narrative



Project Mapping in Dilijan shows areas of comfort and areas for potential growth. **Those are capable of shifting the existing touristic behavior to Dilijan in a certain time perspective:**



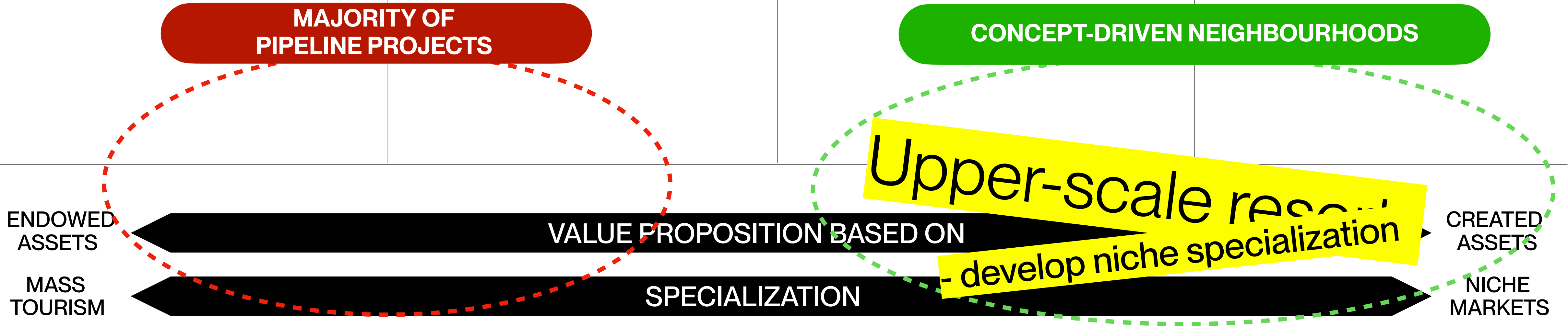
GEOGRAPHY	ESTABLISHMENT	NEIGHBORHOOD	CONCEPT
DILIJAN INN ALTERA HOME	GREEN ROCK RIVERSIDE DILIJAN	DILI TOWN MOUNTAIN VILLAGE	GUERRA PARK AMPER KHANJYAN VILLA



Project Mapping in Dilijan shows areas of comfort and areas for potential growth. **Those are capable of shifting the existing touristic behavior to Dilijan in a certain time perspective:**

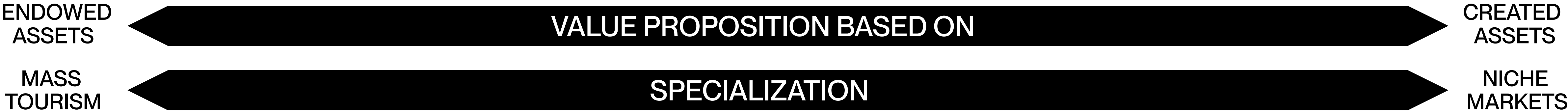
~~ARMENIA~~ ▸ ~~DILIJAN~~ ▸ ~~SMTH IN DILIJAN~~
↓
SMTH IN DILIJAN ▸ DILIJAN ▸ ARMENIA

GEOGRAPHY	ESTABLISHMENT	NEIGHBORHOOD	CONCEPT
DILIJAN INN	GREEN ROCK	DILI TOWN	GUERRA PARK
ALTERA HOME	RIVERSIDE DILIJAN	MOUNTAIN VILLAGE	AMPER
			KHANJYAN VILLA

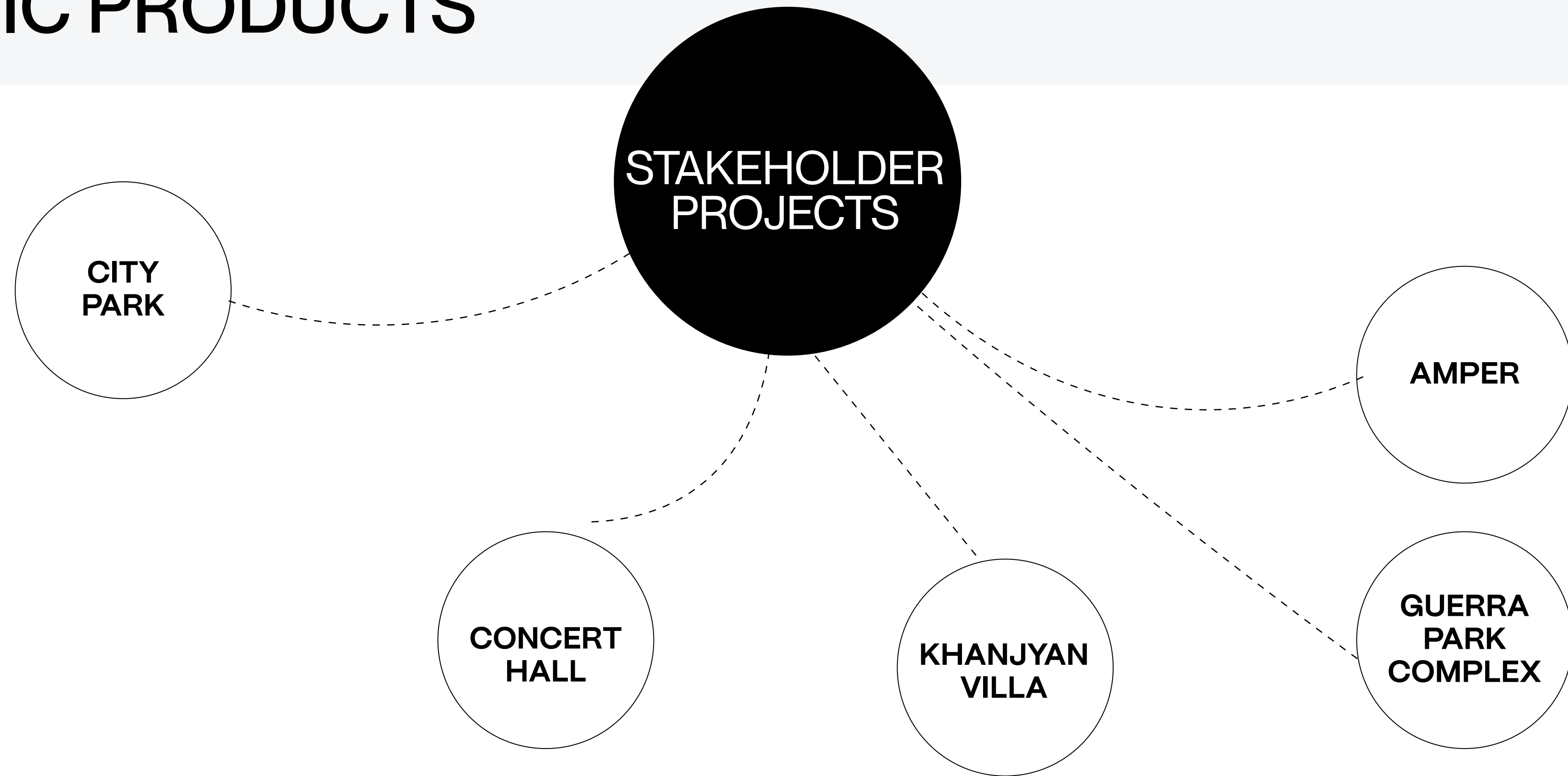


WHY ITS THE WAY TO GO FOR DILIJAN?

WE OBSERVE A MINDSET SHIFT TOWARDS CREATING RELEVANT AND AUTHENTIC TOURISTIC PRODUCTS



WE OBSERVE A MINDSET SHIFT TOWARDS CREATING RELEVANT AND AUTHENTIC TOURISTIC PRODUCTS



ENDOWED
ASSETS

MASS
TOURISM

VALUE PROPOSITION BASED ON

SPECIALIZATION

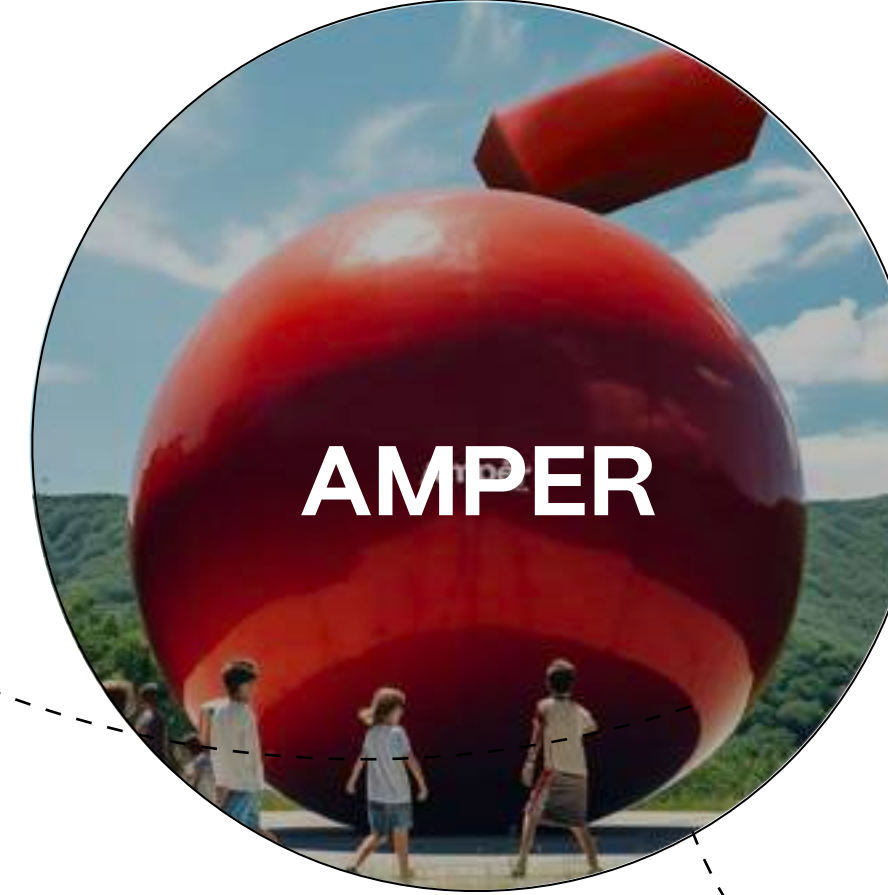
CREATED
ASSETS

NICHE
MARKETS

- Recreation for all ages
- Extending visit to Dilijan from 1 to 3 days
- New areas for public events and happenings
- Improving the quality of life of Dilijanins
- Sporting activities and lifestyle development
- Promotion of environmental quality of everyday life



STAKEHOLDER PROJECTS



- Sustainable development off the beaten route within Dilijan guided by vision of Nature and Heritage Preservation, and Social Impact
- Self-sufficient neighbourhood development with a strong cultural narrative, with potential to re-route the existing growth trajectory of Dilijan
- Has a novel and decentralized offering that can attract new types of audiences, including tourists;
- A high-value offering considers the daily needs and aspirations of the local community, creatives and modern tourist demands.
- Integrates a man-made yet authentic component into the established nature oriented equation, spanning multimedia, performing arts, and craftsmanship.

- Off the beaten touristic route to re-invent into a cultural tourism destination
- Cultural landmark, unique blend of cultural heritage, signature venue design and natural beauty
- Artistic collaboration of global community of creators and enthusiasts - a hub for the development of new cultural practices and forms
- Restoration, preserving architectural integrity while modernising facilities for cultural activities, residencies, and events.



- Immersive Multimedia Museum and a full-fledged cultural center featuring permanent exhibits, temporary displays, and a program of events
- Reconstruction and preservation, pursue EDGE certification



- Off the beaten touristic route destination, in proximity to Central Bank
- Combination of nature, art, culture and entertainment
- Unique architectural fountains based on Guerra's sketches enhanced with technologies in collaboration with world-famous specialized company
- Art Gallery to feature permanent exhibition of Tonino Guerra's artworks, as well as exhibition space, children's creativity center, a high-tech academy (IT);
- Building infrastructure for MICE
- Planting relict trees in the area donated by Italian partners
- Preliminary agreement for Dilijan and Pennabello to become twin cities.

IMAGINE “DILIJAN IN 10 YEARS IS...”

A unique destination for both domestic and international tourists, balancing recreational (ref. nature) and cultural (ref.history revival) offerings of quality relaxation and the chance to return home revitalized and inspired.

DEVELOPMENT OF

wellness tourism, anti-aging practices, healing, rejuvenation, capitalizing on Dilijan's tranquil environment.
cultural and recreational regional hub

EXPANSION OF

ecotourism, leveraging the city's abundant natural resources.
gastronomic tourism, addressing the stay in trend of gastro delights with the city's strong potential.

I WANT TO SEE DILIJAN...

- With Deers coming back

- Without abandoned buildings

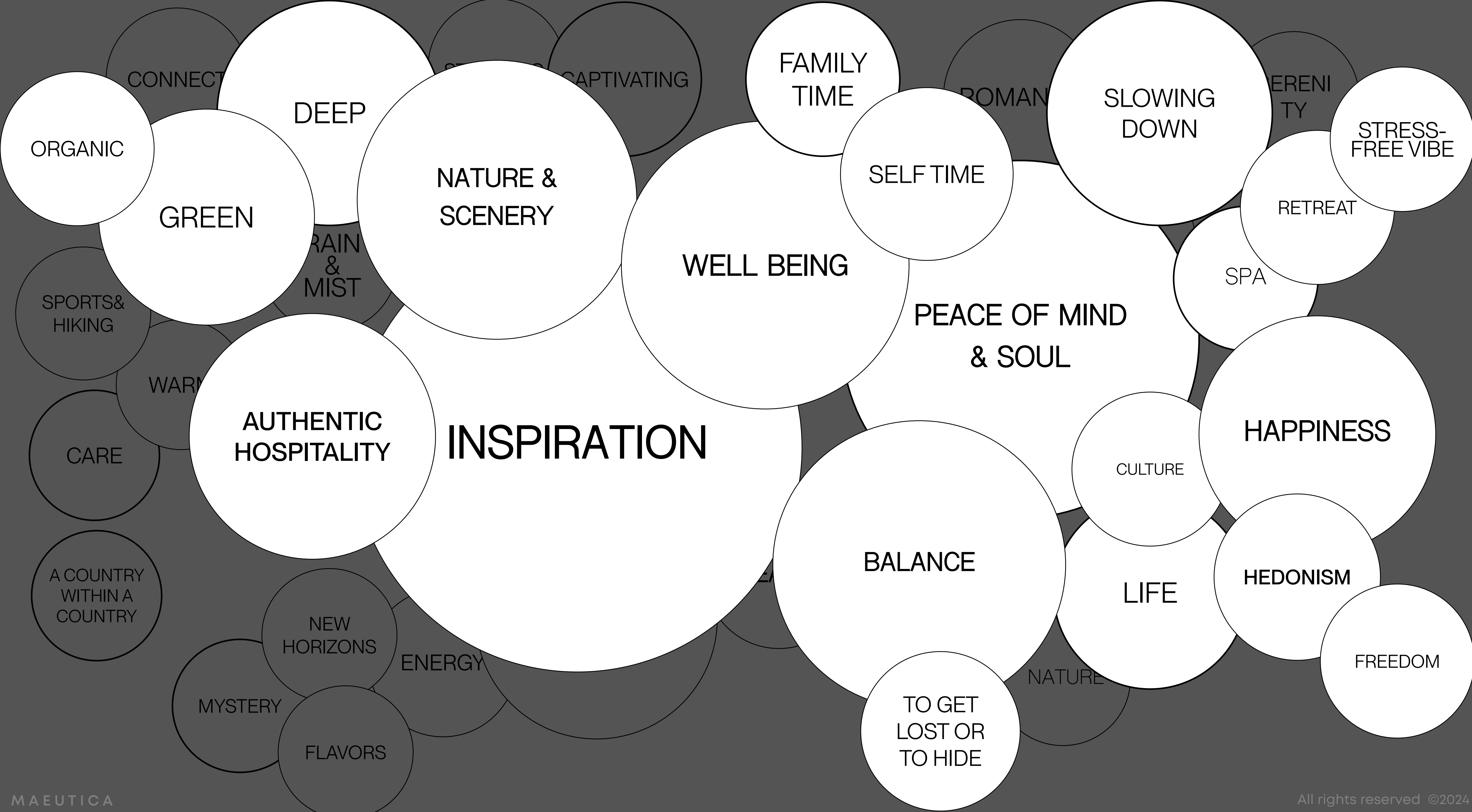
I WANT TO SEE DILIJAN...

- Having a character

- With new icons, without damaging nature and architectural style

- With a coherent architectural fabric beyond the short Sharambeyan str.





CHAPTER: #2

DILIJAN: DESTINATION VISION

Armenia's tourism competitiveness can significantly benefit from emerging global consumer trends, and **Dilijan has the potential to meet modern travel aspirations that align with global trends and changing tourist behaviors.**

PREFERENCE FOR LESSER-KNOWN DESTINATIONS

40% of travelers now choose rural, nature-based destinations. Dilijan fits this trend with its unique, unexplored charm.

APPRECIATION OF WELLNESS

Heightened awareness of wellness especially post-Covid, grounded the **desire to spend more time and money on self-care, wellness, and stress relief** to cultivate healthier lives, wellness tourism will continue to see growth in the long term.

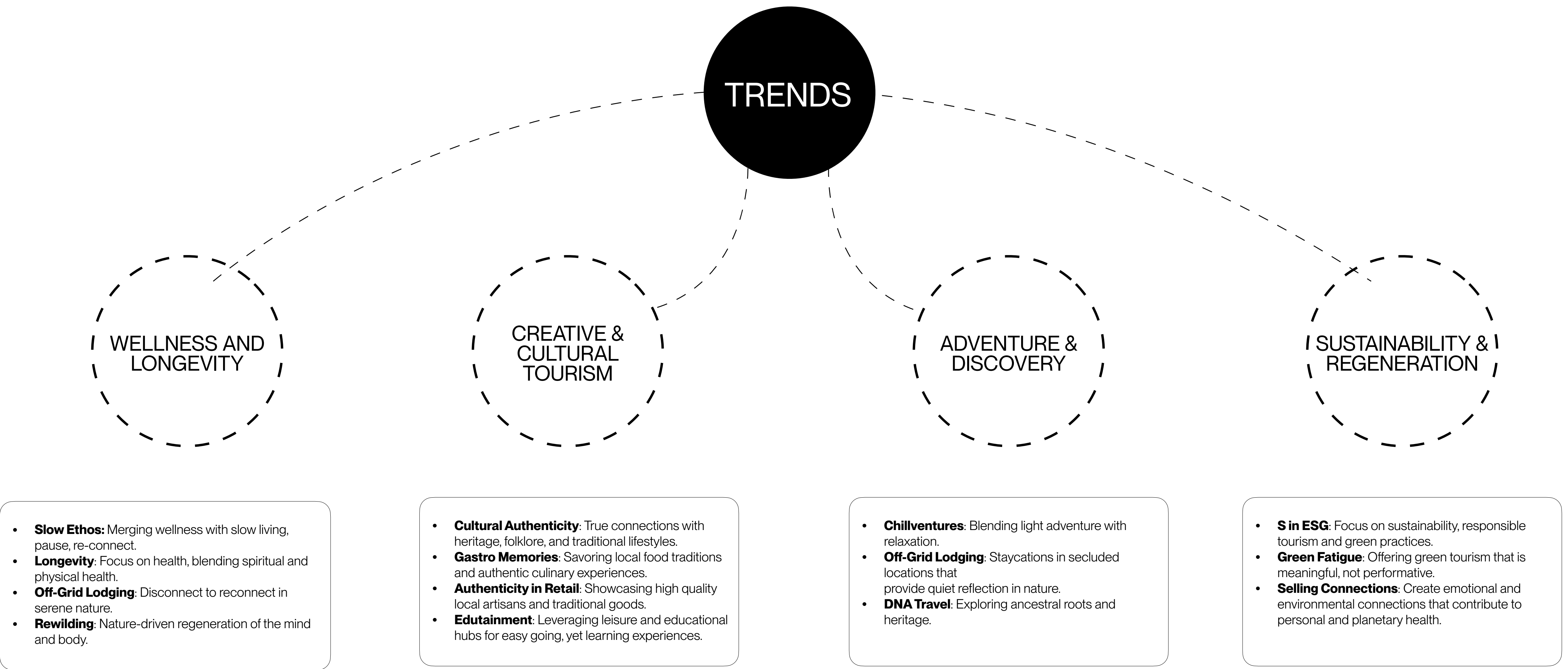
PREFERENCE FOR LONGER STAY

Hybrid models of life and work balance gain prevalence, giving rise to so called **bleisure trips** (“workcations”, “flexcations”). More travelers can experience new destinations and spend extended time being at work in the meantime,

DESIRE FOR LESSER FOOTPRINT AND GREATER IMPACT

Increasing consumer interest goes to sustainable travel - opting for destinations with a smaller environmental footprint, local community benefits. **Second cities and destinations will continue to grow in popularity** in the medium term.

GLOBAL TOURISM TREND CLUSTERS



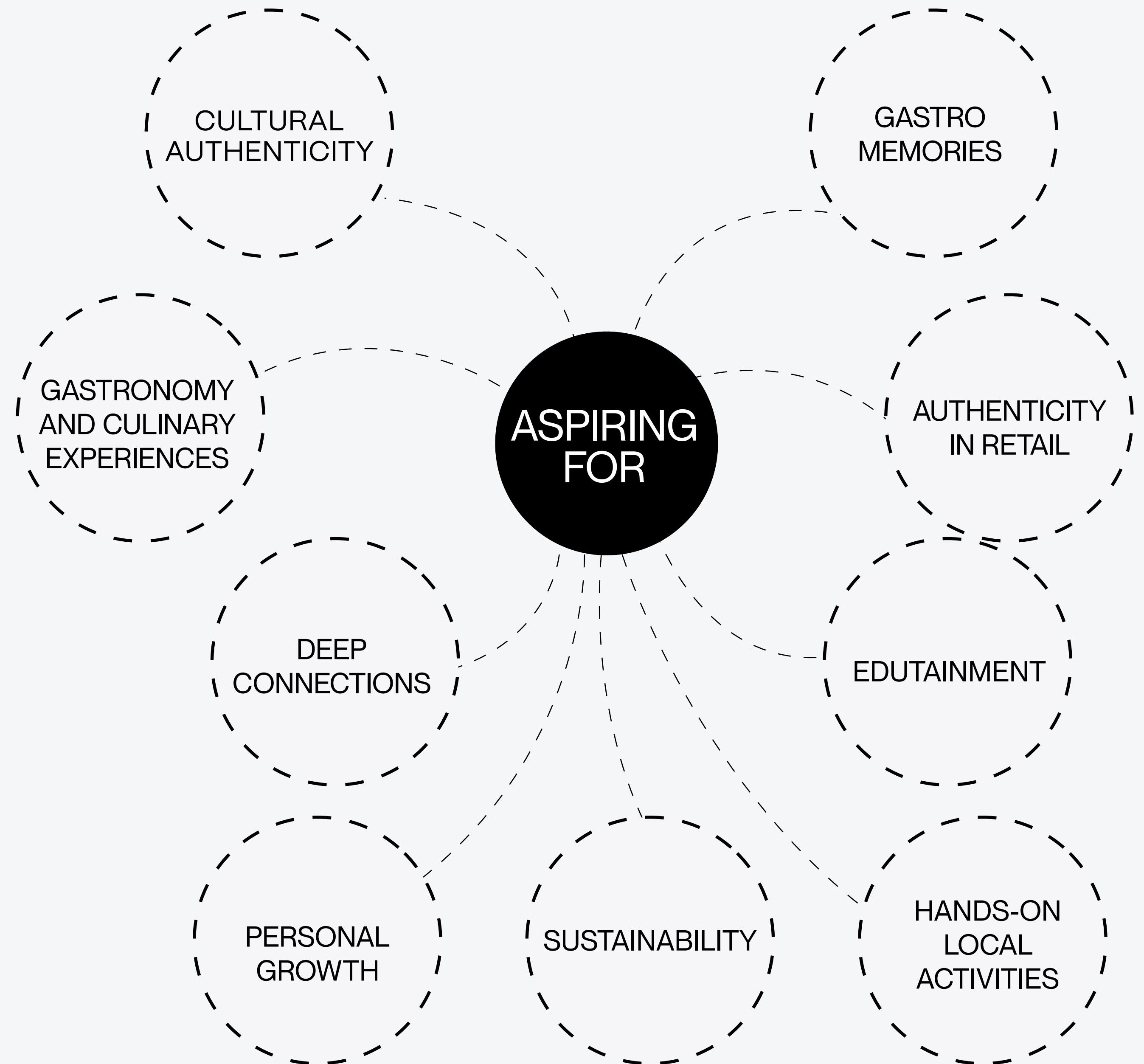
ADVANCED TRAVELERS: PIONEERS OF **CREATIVE TOURISM**

Creative tourism caters to travelers seeking meaningful, hands-on experiences, prioritizing deep engagement with local culture over standard sightseeing.

Quality over Quantity: They prefer immersive, authentic experiences over cramming multiple sites into one trip.

Culture over Luxury: Genuine interactions with local communities are valued more than typical luxury offerings.

Environmental Consciousness: These travelers minimize their impact on ecosystems and local societies, traveling with purpose.



CULTURAL PORTFOLIOS ARE KEY DRIVERS FOR TOURISM IN DEVELOPING ECONOMIES

The pandemic has reshaped tourism, pushing natural and cultural assets to the forefront of tourism-led growth¹. Countries with rich cultural portfolios can capitalize on this shift, regardless of their income levels, by crafting strong tourism strategies.

However, success hinges on visionary management and strategic investments. While this opens a door for developing nations, it's clear that leveraging these assets requires smart, focused work.

¹ World Economic Forum, Travel & Tourism Development Index 2024

40% OF ALL TOURISM

GLOBALLY IS CULTURE AND HERITAGE-BASED

73% OF MILLENNIALS

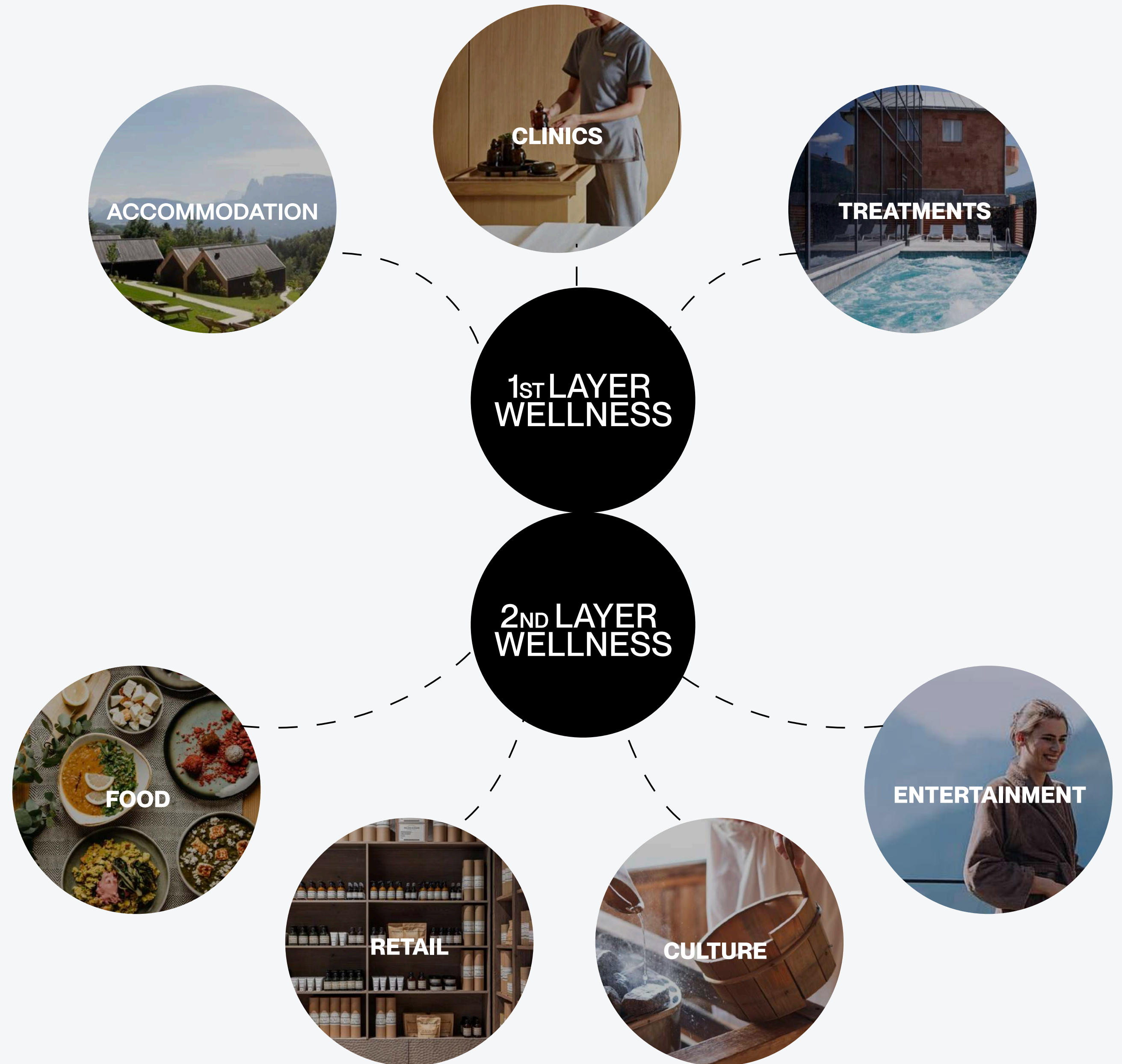
SEEK OUT DESTINATIONS RICH IN
CULTURE AND HISTORY

THE NEXT FRONTIER OF GLOBAL WELL-BEING: **WELLNESS TOURISM**

Wellness tourism is a fast-growing segment of the \$436 billion wellness economy (2020) projected to triple by 2025 driven by travelers seeking more profound health and well-being experiences.

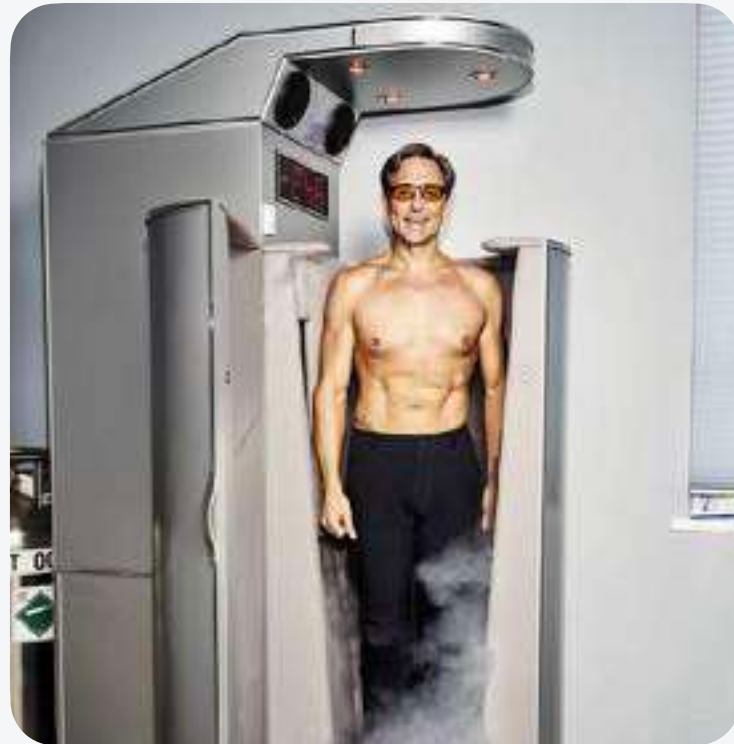
Wellness tourism goes beyond treatments and accommodations, driving growth in the wider ecosystem.

It fuels demand for food, retail, and immersive experiences, supporting a holistic approach to travel where local economies thrive through wellness-driven gastronomy, artisanal products, and cultural engagement.



TYPE OF WELLNESS TOURISM

SCIENCE-BACKED WELLNESS



LONGEVITY & PREVENTION

Prioritizing scientifically validated, holistic treatments and preventive care boosting the segment of resorts and clinics offering tailored, evidence-based solutions that enhance well-being, focusing on ***personalized longevity and lifestyle-based services.***

GENERAL WELLNESS



CALM, PAUSE & REJUVENATE

Driven by health-conscious travelers prioritizing prevention, wellness today is the overarching theme, covering all aspects of life, from inner peace to family balance. Intertwined with the Slow Living Ethos it emphasizes calming, family-friendly environments and relaxation-focused experiences. ***It transcends mere treatments, becomes a holistic lifestyle.***

Real luxury - quite luxury, in life is ability to slow down and take care of your-self.

Dilijan has to offer that exact **unique luxury**, where solitude, nature, and culture interweave.

WELLNESS

AS A

QUITE LUXURY

The World in Post
Pandemic era
epitomised

WELLNESS

that is

=

MAINTAINING HEALTH

TREATMENT & SCIENCE

SPA & SELF-CARE

BALANCE & NATURE

MEANINGFUL TRAVEL

NOISE CANCELLATION

TAKE THINGS SLOW

The World in Post
Pandemic era
epitomised

WELLNESS

that is

=

MAINTAINING HEALTH

TREATMENT & SCIENCE

SELF-CARE

BALANCING LIFE

MEANINGFUL THINGS

NOISE CANCELLATION

TAKE THINGS SLOW

WHOLENESS

CAN DILIJAN DELIVER A
WHOLENESS EXPERIENCE?

WHERE CAN DILIJAN
EVOLVE AS A DESTINATION?

WHO CAN BE
THE TARGET AUDIENCE?

“ К концу дня люди должны почувствовать, что им действительно удалось отдохнуть морально от всей суеты рабочих будней и **что именно здесь в этом городе они чувствуют себя наполненными, вдохновленными и мотивированными к новым свершениям в своей повседневной жизни.**

“ Вдохновляющая и исцеляющая природа, котел, где перемешиваются и во взаимодействии развиваются таланты и тренды

“ отличительная черта Дилижана среди других городов Армении - он обладает уникальным сочетанием факторов. Сейчас в мире все стараются максимально уйти от суетного образа жизни, проводить больше времени в уединении с природой, работать и творить удаленно, Дилижан отлично для этого подходит.

“ It's a place ... to be in nature having rest here as they would belong to their mother's womb

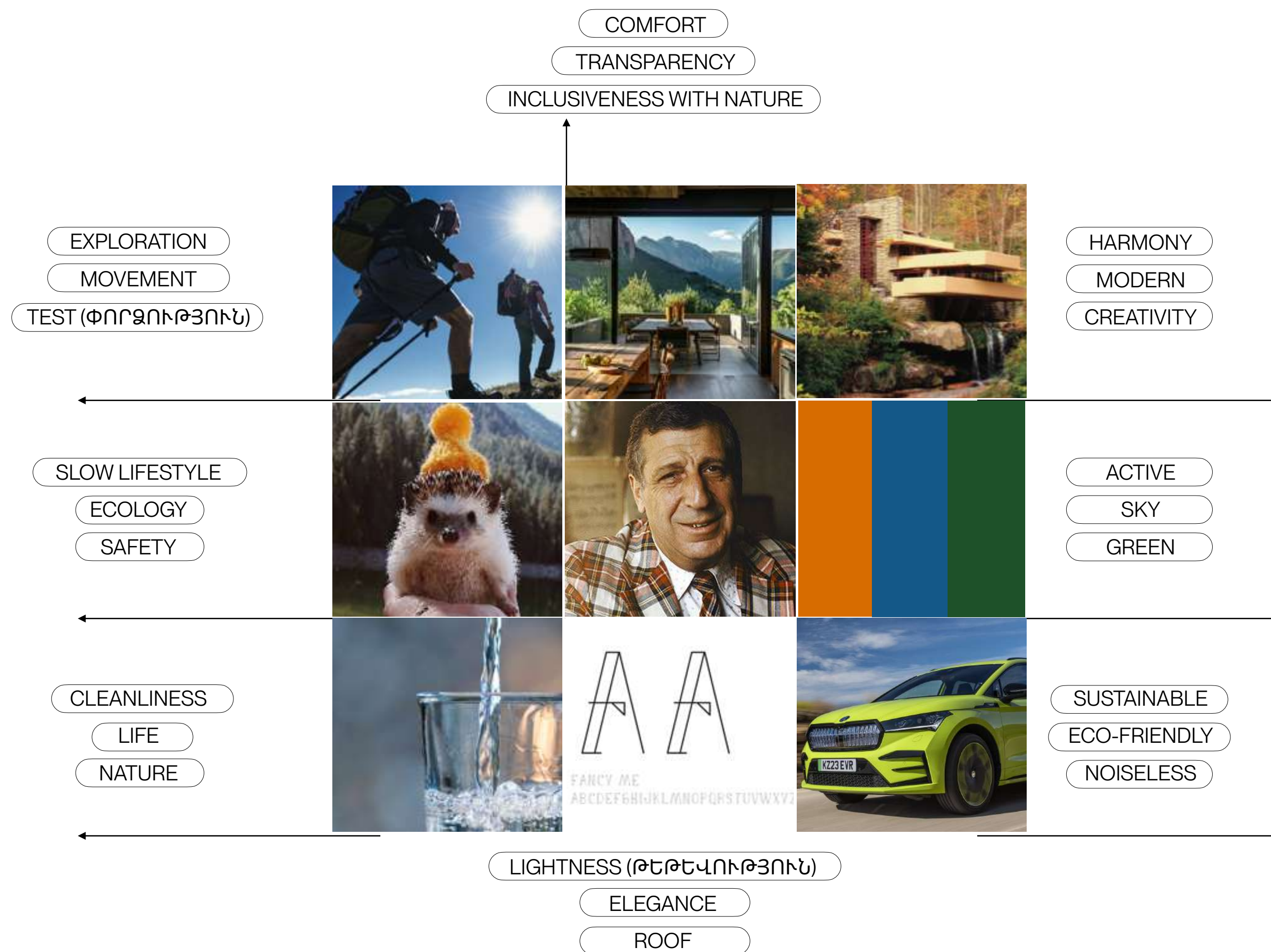
“ **Дилижан он про жизнь**, полную умиротворения, спокойствия, **уединение с природой и вечный поиск себя.**

“ у Дилижана есть объективные внутренние ресурсы туристической привлекательности, но потенциал их не раскрыт: бальнеология.

“ Дилижан мотивирует к открытиям. Это не Гарни и Гегард, где можно погрузиться в историю, это не Гюмри, с ярко-выраженной харизмой. Дилижан для каждого свой, Дилижан – больше про себя, через окружающий мир, а не про познание окружающего мира как такового.

BRAND DRIVER

VOTED BY TEAM



Source: Brand Discovery Workshop with Stakeholders, 2024

VALUES

VOTED BY TEAM

- ● ● ● ● ● 6 Well-being
- ● ● ● ● ● 6 Culture
- ● ● ● 4 Nature, green
- ● 2 inspiration, creative
- 1 Eco-friendly

KEYWORDS

DERIVED FROM DISCUSSIONS

#SLOWNESS

#EXPLORATION

#NOISELESS

#INSPIRATION

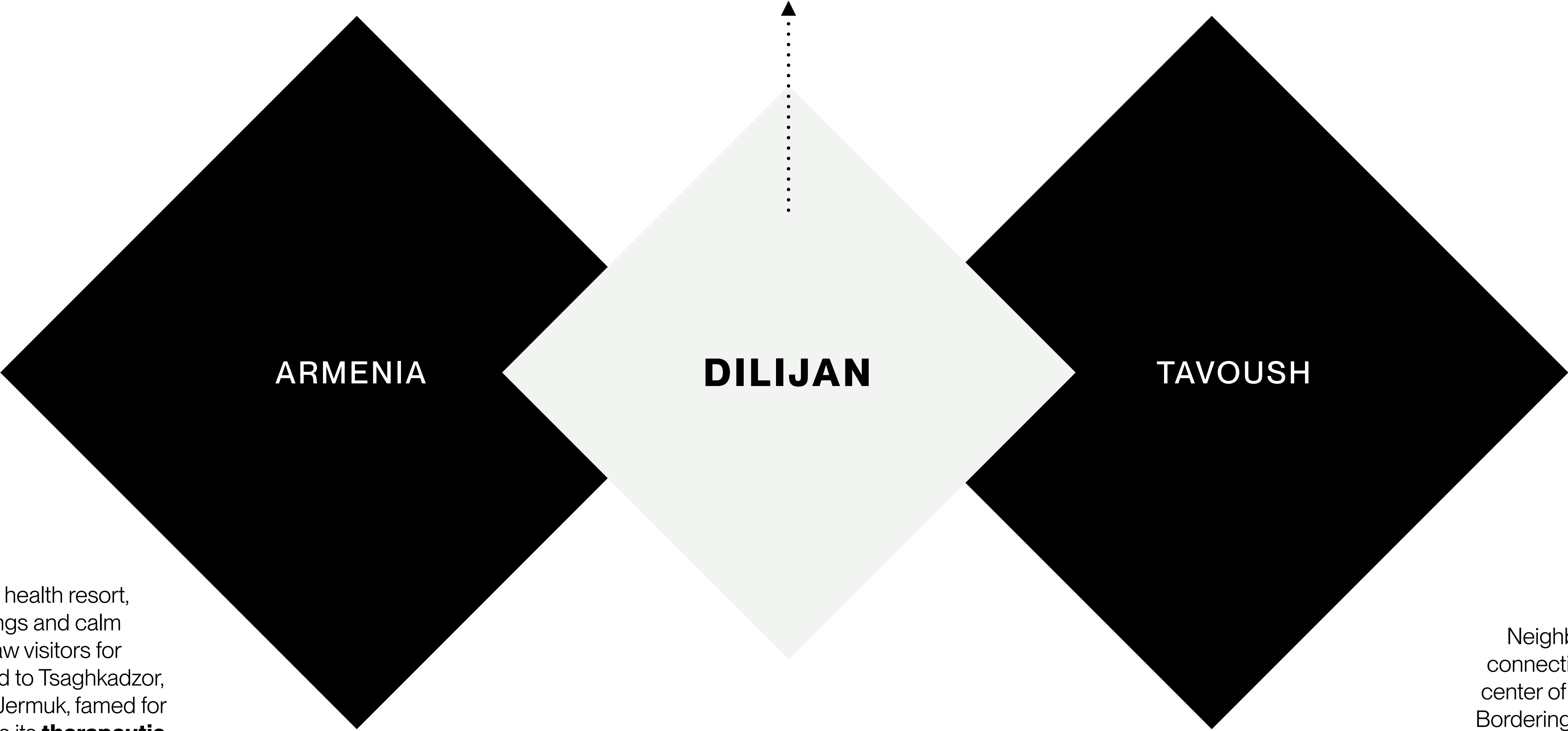
#LIGHTNESS

#CULTURE

#TOGETHERWITHNATURE

MULTI-FACETED

nature-based, wellness,
artistic and educational

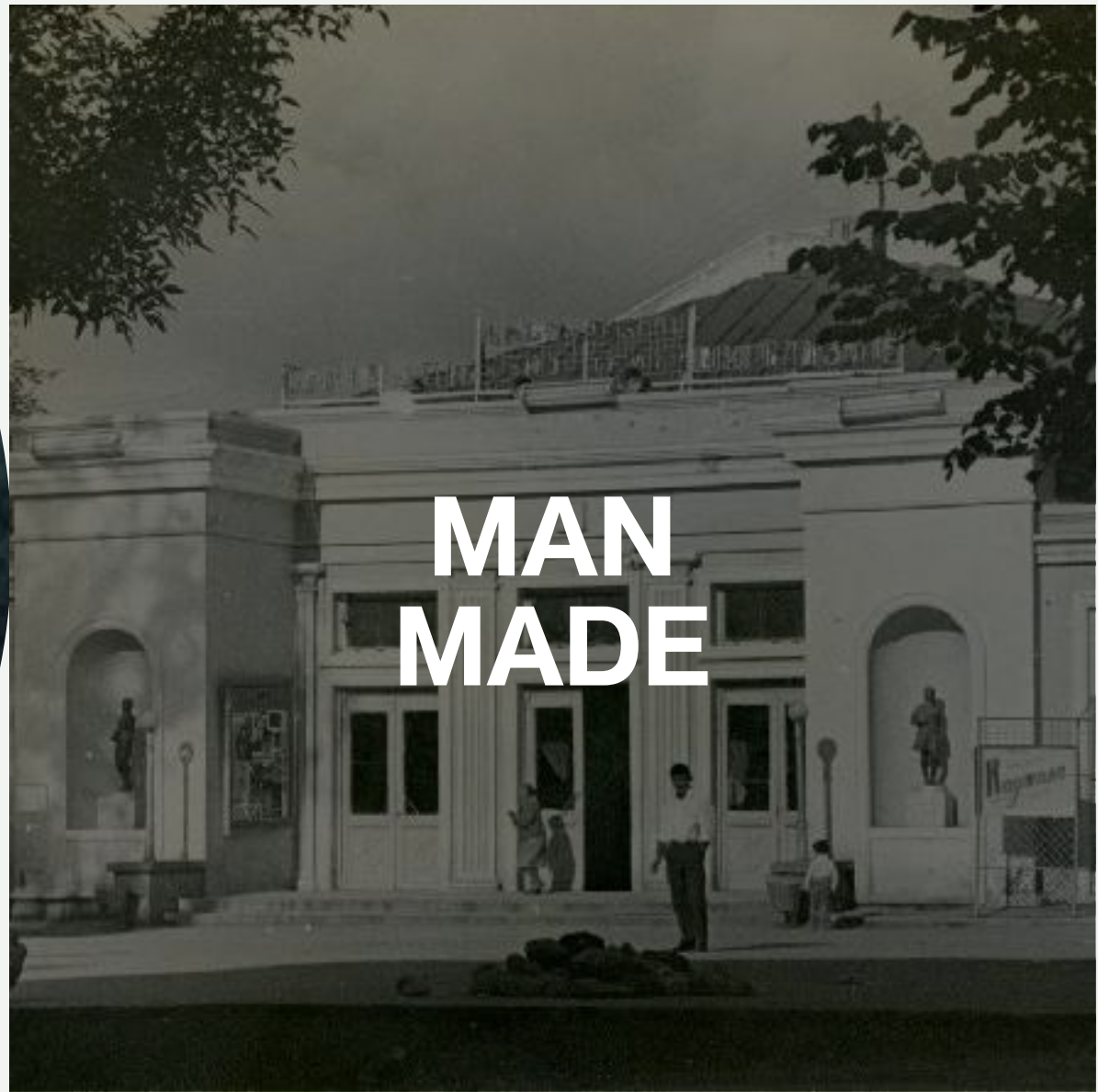


Historically recognized as a health resort, Dilijan’s natural mineral springs and calm atmosphere continue to draw visitors for wellness tourism. Compared to Tsaghkadzor, known for winter sports, or Jermuk, famed for hot springs, Dilijan combines its **therapeutic reputation** with an artistic and tranquil vibe, ideal for those seeking both **wellness and inspiration**.

Neighboring settlements have more connectivity with Ijevan (administrative center of the region), rather than Dilijan. Bordering with Lori region, Dilijan rather stands out on its own, than becomes a part of either Tavush or Lori.

PART OF THE TRIAD

DILIJAN IS HYBRID



#NATIONALPARK

#LITTLESWITZERLAND

#NATURALBEAUTY

#TRANQUILESCAPE

#NATURE

#OUTDOORACTIVITIES

#ADVENTUROUS SPIRIT

#CHARMINGTOWN

#CULTURALRICHNESS

#WELCOMINGLOCALS

#CULINARYDELIGHTS

#HAGHARTSIN

#GOSHAVANK

#HISTORY

HYBRID ECOSYSTEM

INSPIRATION

TRANQUILITY

REJUVENATION



LEGACY

HOSPITABLE

VARIETY

MERGING TWO DOMINANT NARRATIVES

A BREATH OF INSPIRATION

Inspiration is the most power-full economic asset of the modern world. And Dilijan has long been fueling artists, musicians, and craftsman with inspiration. Inspiration often requires both: slow observation, thinking and solitude, as well as cultural exchange.

THERAPEUTIC GETAWAY

Dilijan has always served an escape from the hustle and noise of city life for people wishing to treat themselves to relaxation, renewal and rejuvenation.

WHOLENESS AND WELL BEING

WELLNESS THROUGH

NATURE

GASTRONOMY

CULTURE

INSPIRATION

REJUVENATION

SLOWNESS

DESTINATION VISION

Hybrid Wellness Destination

merger of diverse touristic areas that
promote a unified state of well-being

DESTINATION THAT EMBRACES A

Slow Well Being

PHILOSOPHY

SHIFTING THE AGENDA

ESCAPE FROM

ESCAPE **TOWARDS**

Slow Well Being

coin a term that will combine the principles of **wellness tourism** with the **slow living ethos**, focusing on a holistic and sustainable approach to well-being.

THIS POSITIONING ENCAPSULATES DILIJAN'S CURRENT STRENGTHS WHILE VISIONING DILIJAN TO EXPAND INTO A HUB FOR WELLNESS TOURISM, COMBINING BOTH SPIRITUAL REJUVENATION AND WORLD-CLASS WELLNESS INFRASTRUCTURE, WHILE PRESERVING ITS TIMELESS INSPIRATION AND AUTHENTIC CHARM.



In Dilijan, wellness is more than a treatment—it's a way of life that blends nature, mindfulness, and cultural immersion. Visitors are invited to experience a journey of wholeness, discovering inspiration in both the landscapes and traditions that make Dilijan a unique destination for slow, meaningful travel.

2-TIER VISION

Slow Wellness

**1st
TIER**EMBRACE WELLNESS:
ABSTRACT THEME

LEVERAGING THE “NATURAL” WELLNESS ECOSYSTEM

Leverage natural beauty and existing cultural programs and heritage, offer visitors a spiritual retreat through nature and creative inspiration.

Built up on pipeline projects of cultural and holistic visitor experiences.

**2nd
TIER**EMBRACE WELLNESS:
PRACTICAL THEME

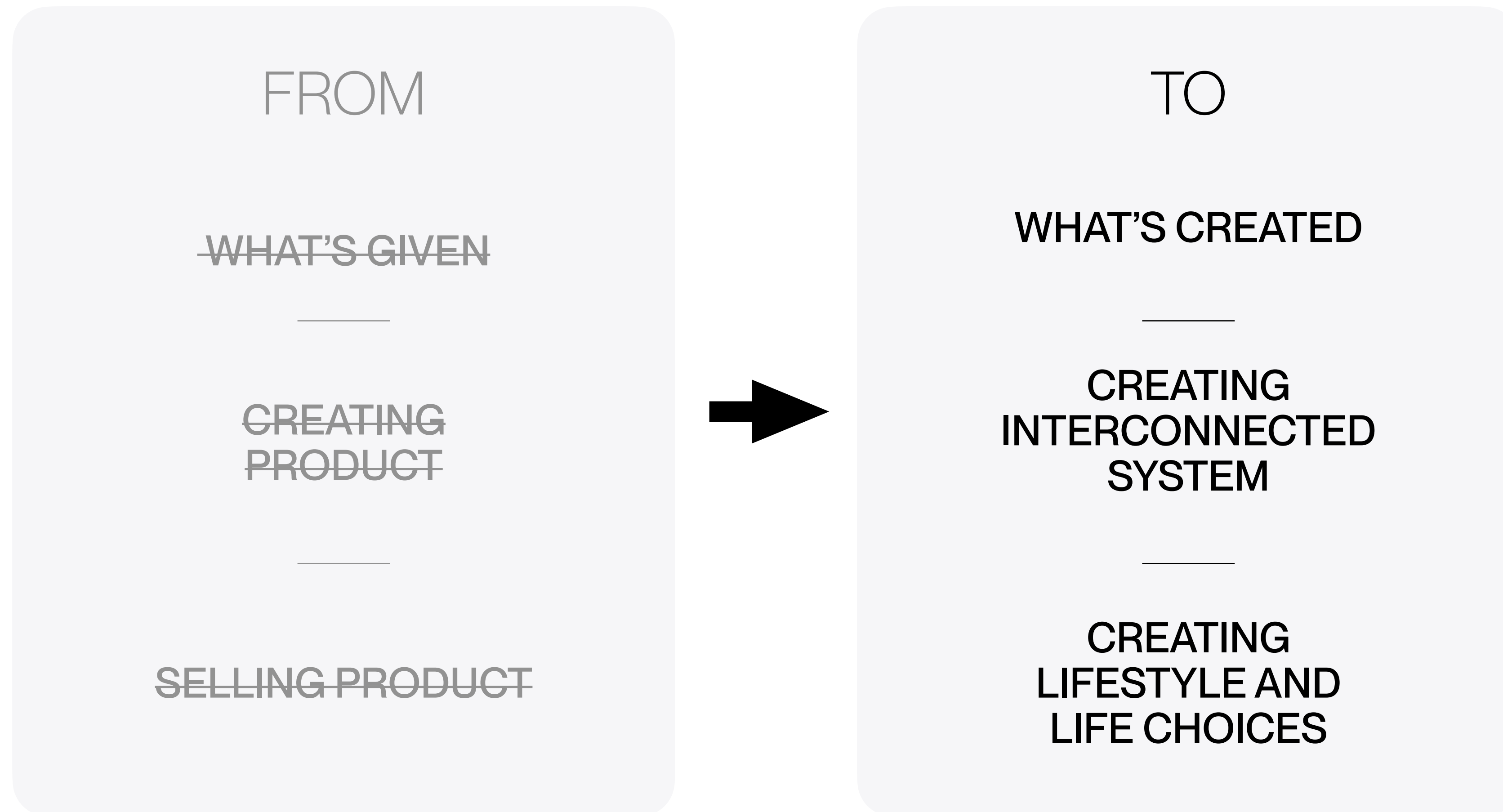
MOVE ON WITH ESTABLISHMENT OF A WELLNESS INFRASTRUCTURE

Introduce **wellness-focused centers** and specialized resorts, offering therapeutic and health programs. This expansion will turn Dilijan into a **global wellness destination**, combining its natural charm with cutting-edge wellness infrastructure.





FOR A DESTINATION TO WORK, APPROACH TOWARDS TOURISTIC OFFERING SHOULD SHIFT



FUTURE GROWTH

Culinary wellness retreats focusing on nutrition, signature establishments praising local produce in style, workshops on local cuisine and farm to table experiences.

FUTURE GROWTH

Sustainable living projects, carbon-neutral resorts, green tours that engage with environmental education, eco farms.

FUTURE GROWTH

Well developed hiking ecosystem and support, diversification of adventure/extreme products.



Nature and Scenic Landscapes: Offering tranquility, outdoor activities (hiking, birdwatching, forest walks), and mental peace, providing immediate wellness for visitors.

Cultural Heritage Sites: Soviet-era buildings, Dilijan National Park, and monasteries blend history with calmness, creating cultural sanctuaries.

EXISTING



FUTURE

Wellness Centers & Retreats: Focus on mindfulness, creativity, and emotional balance as longevity and prevention, along with healing and physical recovery. These can evolve into specialized treatment resorts, offering detox, relaxation, and therapeutic experiences.



FUTURE GROWTH

Creative retreats, residencies, open-air art studios, artist-in-nature programs, performances.



FUTURE GROWTH

Research hubs on ecology, conferences on culture and history, collaboration with international universities, philosophical retreats.



FUTURE GROWTH

Combining business and networking with great rejuvenation and family time.

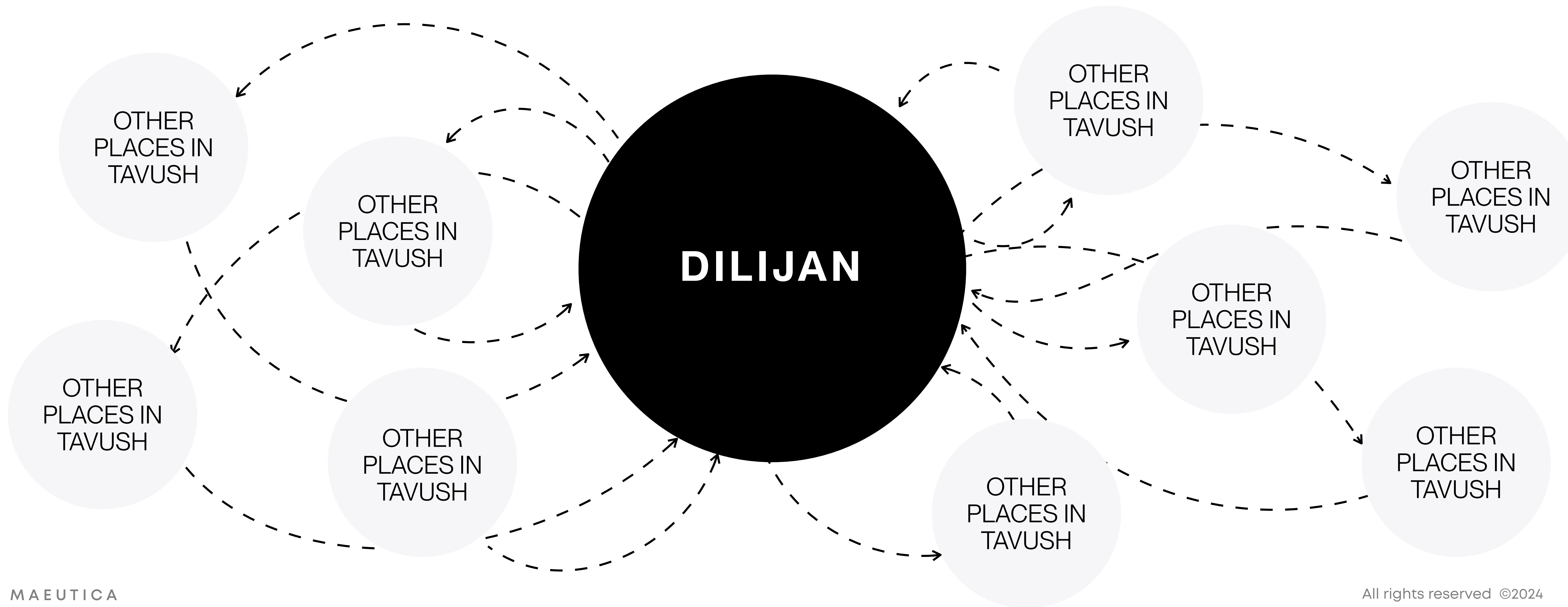


FUTURE GROWTH

Co-working spaces integrated into nature, long-term stay packages, wellness and work-life balance hubs.

NOT A PASS-WAY, BUT A HOME BASE

Current tourist flow mainly spends the whole day outside Dilijan and only needs accommodation to spend the night and have some breakfast. Reinvented Dilijan keeps the visitors occupied, meanwhile serves as an ideal home base while on a trip through the great Tavush Province.



SLOWNESS & WELLNESS SEEKER

Detox from urban life, and rejuvenate body and mind. Short term general wellness, long term - professional wellness & longevity infrastructures.

VISION: A place for mindful retreats, organic farm-to-table dining, outdoor yoga, meditation, and forest bathing experiences. Dilijan can become synonymous with sustainable travel and eco-friendly luxury, appealing to those who prioritize a holistic, green lifestyle.

CULTURAL & ARTISTIC ESCAPE

VISION: Dilijan as an art-infused town should have a cultural symbol(s) with cultural program of events, open-air art installations, artisan markets, and artist-in-residence programs, offering tourists the opportunity to participate in or observe the creative process, eco fashion, handmade centers. Prototypes: Salzburg, Tulum, Santa Fe.

ADVENTURER

Active, thrill-seeking individuals find their narrative in Dilijan's mountains, trails, and protected areas.

VISION: A base for adventurers seeking year-round outdoor activities — hiking, mountain biking, and nature expeditions, trekking in the summer to winter sports. The “adventure capital” narrative creates an aspirational draw for individuals looking for fitness, challenge, and exploration, akin to destinations like Whistler or the Swiss Alps.

CULINARY & SLOW-FOOD SEEKER

In line with global preference for sustainable gastronomy, those who value traditional and artisanal food, focusing on locally sourced produce and Armenia's rich culinary heritage. Culinary tourism can be aspirational for those who view food as a key part of culture and lifestyle, akin to what Tuscany offers.

VISION: A place for authentic food experiences, farmers' markets, mushrooms and gatas, slow-cooked traditional dishes, and food festivals.

PROTOTYPES OF FUTURE LIFESTYLE ATTRACTORS

INTELLECTUAL/ ACADEMIC PURSUITS

Build up on existing institutions like UWC Dilijan, will cater to more intellectual crowd and make Dilijan a destination of mind-expanding, personal enrichment and learning for the most various ages.

VISION: Creative products like philosophy retreats, creative writing seminars, guest lecture series, “scholar tourism,” where visitors can attend think tanks, seminars, or specialized programs on history, culture, and environment.

CURRENT TOURIST ARCHETYPES IN DILIJAN



Person drawn to Dilijan's natural landscapes, forests, rarely hiking opportunities.

Often seek peaceful retreats into nature, focusing on outdoor activities such as trekking, bird-watching, and photography.

Values quiet, scenic environments and minimal disruption from urban life.



Though smaller in number, this group comes for more physically engaging activities like mountain biking, or exploring the surrounding mountains.

They look for adrenaline-pumping experiences and gravitate toward regions that offer a mix of challenge and exploration. Dilijan becomes one of the spots, especially due to TCT.



Focused on exploring overall Armenia, with time allocated to region's heritage and cultural sites.

Enjoys Dilijan's traditional architecture, museums, historical churches, and festivals.

Prioritizes learning about Armenia's history, folklore, and traditions while immersing themselves in the local cultural experiences.



Part of travel episode to Armenia from nearby regions. They come to Dilijan for short, relaxing weekend trips. Often stays at hotels or guesthouses, visits local restaurants, and partake in low-effort activities like strolling through town, visiting the market, or enjoying a spa day.

Sub-type of weekend goer is a friends/couples/families gateway coming from other parts of Armenia, especially Yerevan.



Families searching for peaceful environment and child-friendly climate for a bit longer period as a restart.

They often prioritize safe, relaxing environments for their children and look for nearby attractions to enrich the experience and keep the kids busy.



Limited MICE in terms of team buildings, retreats.

Singular big events, or one of the destinations during national events.

FUTURE FORWARD TOURIST PROTOTYPES



- Dilijan is repositioning as a wellness destination.
- Attracts eco-friendly travelers seeking holistic experiences.
- Interests include eco-lodges, forest bathing, and nature therapy.
- Prioritizes sustainability and minimal environmental impact.



- Reflects the Cultural & Artistic Escape lifestyle.
- Attracts artists, writers, and creatives seeking inspiration.
- Drawn to artisan markets, art residencies, and cultural experiences.
- Participates in workshops and artistic performances.
- Prefers unique, aesthetically curated accommodations.



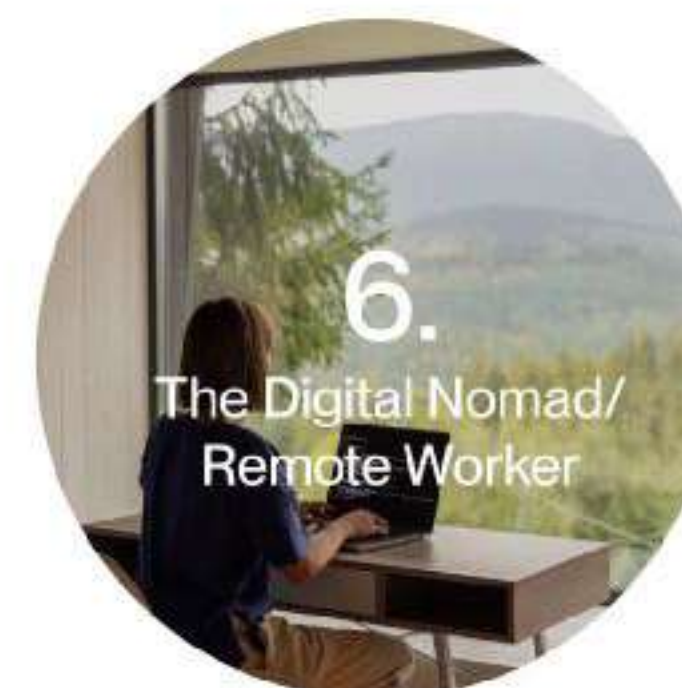
- Dilijan is enhancing its adventure tourism infrastructure.
- Targets active individuals and groups seeking year-round outdoor activities.
- Interests include hiking, mountain biking, trail running, and winter sports.
- Prefers destinations that combine challenge with nature.
- Looks for relaxation options like eco-lodges or wellness centers.



- Aligned with the Culinary & Slow-Food Movement.
- Seeks food tourism and farm-to-table experiences.
- Prioritizes authentic culinary experiences, local markets, and cooking classes.
- Enjoys wine tastings and learning about regional food traditions.
- Drawn to destinations emphasizing sustainability in gastronomy.



- This future-forward archetype is a blend of individuals looking for both intellectual stimulation and mental wellness.
- They come to participate in retreats, seminars, or workshops while also engaging in wellness-oriented activities like meditation, mindful walks in nature, and personal development.
- Dilijan can become a hub for philosophy, history, or artistic reflection, where intellectual curiosity is paired with an environment conducive to mental and physical well-being.



- The rise of remote work is creating a new segment: digital nomads.
- Dilijan can capitalize on this trend with co-working spaces and reliable internet.
- Appeals to those seeking productivity alongside relaxation and adventure.
- Prefers destinations offering quality of life, nature, good food, and wellness activities.

HYBRID USER SCENARIOS

Prototyping a typical day in Dilijan that can accommodate a distinct yet coexisting hybrid experiences

MORNING

Fresh, farm-to-table breakfast: freshly baked bread, organic fresh greens, mushrooms and eggs, fresh vegetables, gata, juice, water.

AFTERNOON

Walk to local market to buy fresh produce, local artisanal products, walk around, sit in an urban environment.

Going for a hike, or take a bike ride, watch birds, get back to have a rest in the hotel.

Wander around the city, sketch, think, inspire, ideate.

EVENING

Dress up, head to a symphonic orchestra performance, spend a culturally saturated evening. After, go sip some wine or have a cocktail at a local bar.

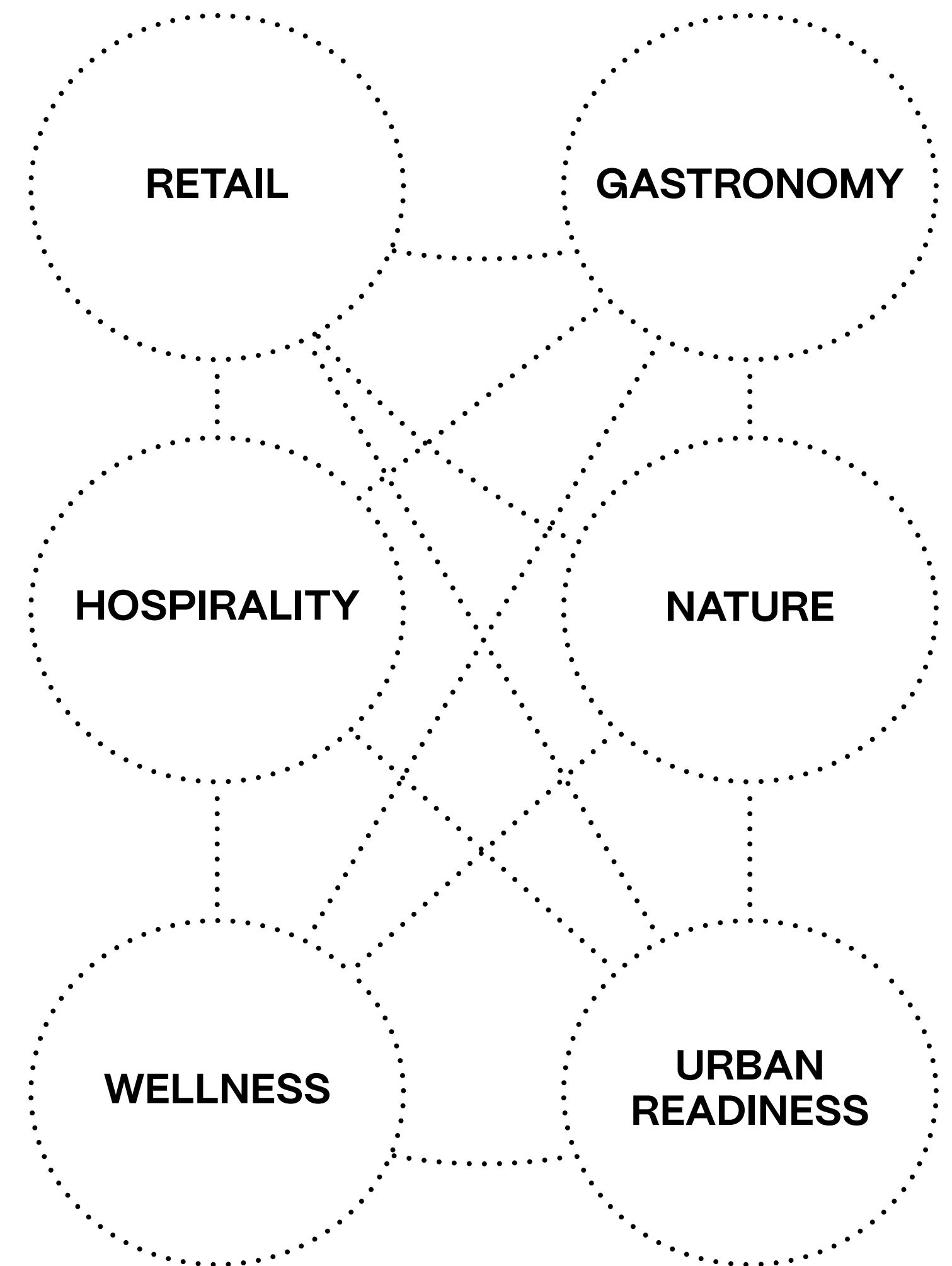
Gather around a fire in a natural setting: music, talks, snacks, stargazing.

IDENTIFYING MISSED OPPORTUNITIES AND TURNING THEM INTO “GOLD”

Dilijan's natural and cultural richness can evolve beyond just a tourist spot. With proper planning, it can offer a wide range of themed experiences and attractions, appealing to both **inbound** and **domestic** travelers.



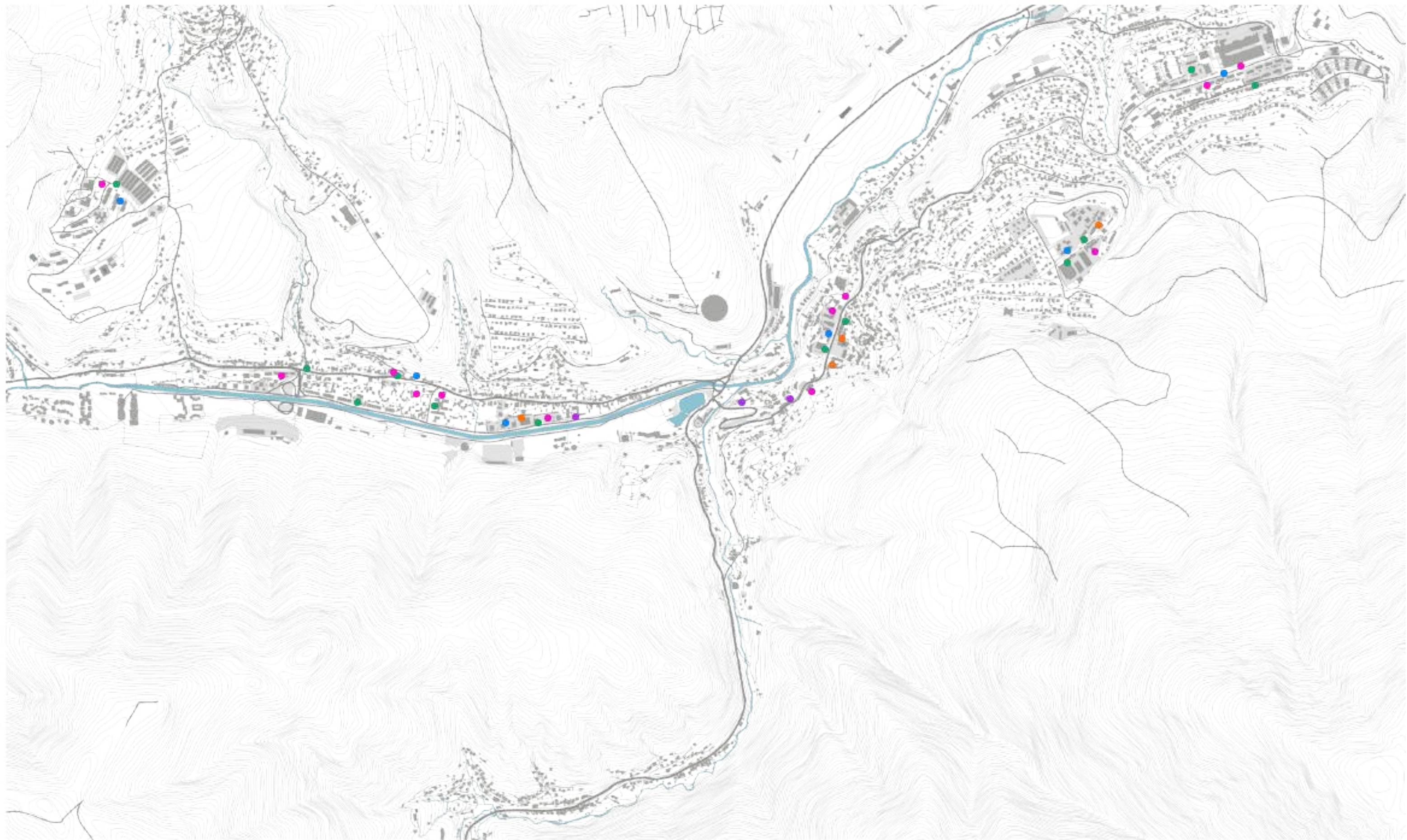
TO POSITION DILIJAN AS A HYBRID ECOSYSTEM OF HOLISTIC WELLNESS CATERING TO A VARIETY OF VISITOR ARCHETYPES, IT NEEDS **A MULTI-TIERED FRAMEWORK THAT INTERCONNECTS CURRENT ASSETS TO BUILD A FUTURE WELLNESS-ORIENTED ECOSYSTEM.**



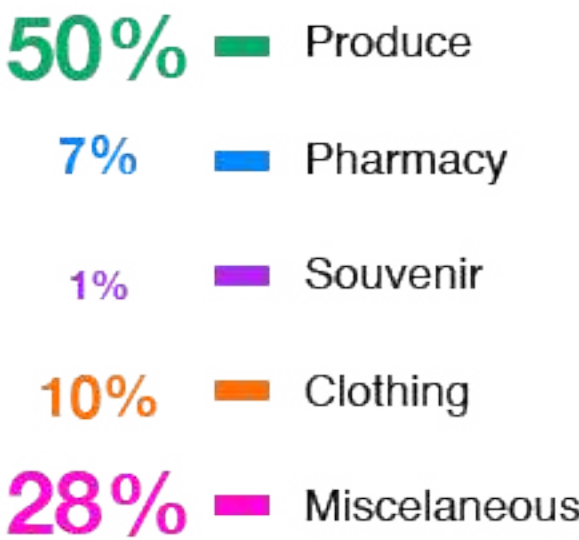
DILIJAN: RETAIL

ANALYSIS | OPPORTUNITY | RECOMMENDATIONS

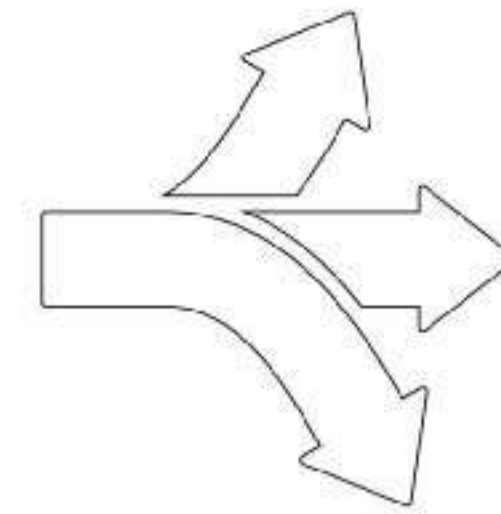
RETAIL



LIMITED TO LOW QUALITY
SOUVENIERS & LOCAL
ARTISAN SHOPS

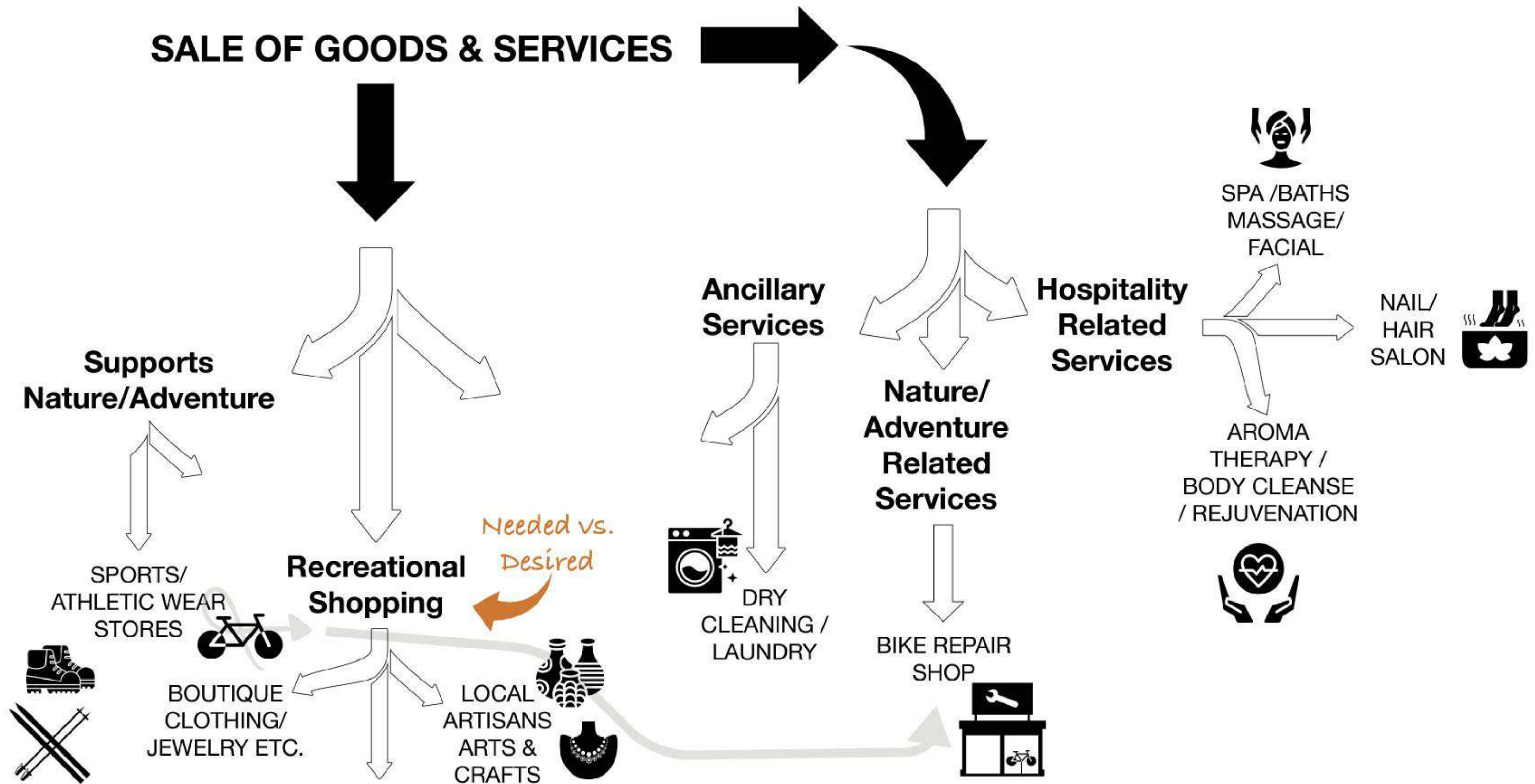


RETAIL : Opportunity



1. **Launching services that depend on retail support**
2. **Creating critical mass through the expansion of services**
3. **Focusing on year-round seasonal services to drive positive foot traffic**

RETAIL : PRODUCT



HIGH QUALITY CRAFTSMANSHIP EXAMPLE

- Joint marketing/promotion campaigns with local DMO/tourism actors
- Partnerships with public/private event planners, including globally
- Concept store jointly with Armenian designers
- Joint souvenir lines with local artisans/arts&crafts centers

WELLNESS

DECOR ITEMS

GIFTS

KIDS STORYBOOKS



Antique Weight Stands

\$75.00



Ceramic Round Vase

\$295.00



Square Red Ceramic Bowl

\$400.00



Blackberry Farm Playing Card Box with Cards

\$134.00



Blackberry Puzzle Collection

\$240.00



Blackberry Farm Tumbling Tower

\$350.00



Blackberry Mountain Custom Cashmere Sweater

\$438.00



Blackberry Farm Custom Cashmere Travel Set

\$490.00



Custom Cashmere Striped Blanket

\$1,400.00

DILIJAN: GASTRONOMY

ANALYSIS | OPPORTUNITY | RECOMMENDATIONS

GASTRONOMY: Opportunity

**CATER TO VARIETY OF
TOURISTS TYPES:**



WELLNESS



ADVENTURE



LEISURE

**PROVIDE A VARIETY OF
PRICE POINTS:**

\$

\$\$

\$\$\$

\$\$\$\$

**PRODUCT
OFFERED:**



COUSINE/
EXPERIENCE



FRESH
PRODUCE



PACKAGED
GOODS



LONG
EXPERATION
DATE

95%

ARMENIAN COUSINE

CONSISTS OF:

- CAFES
- BARS
- RESTAURANTS

GASTRONOMY: Proposal

1. 'DILI' FARM



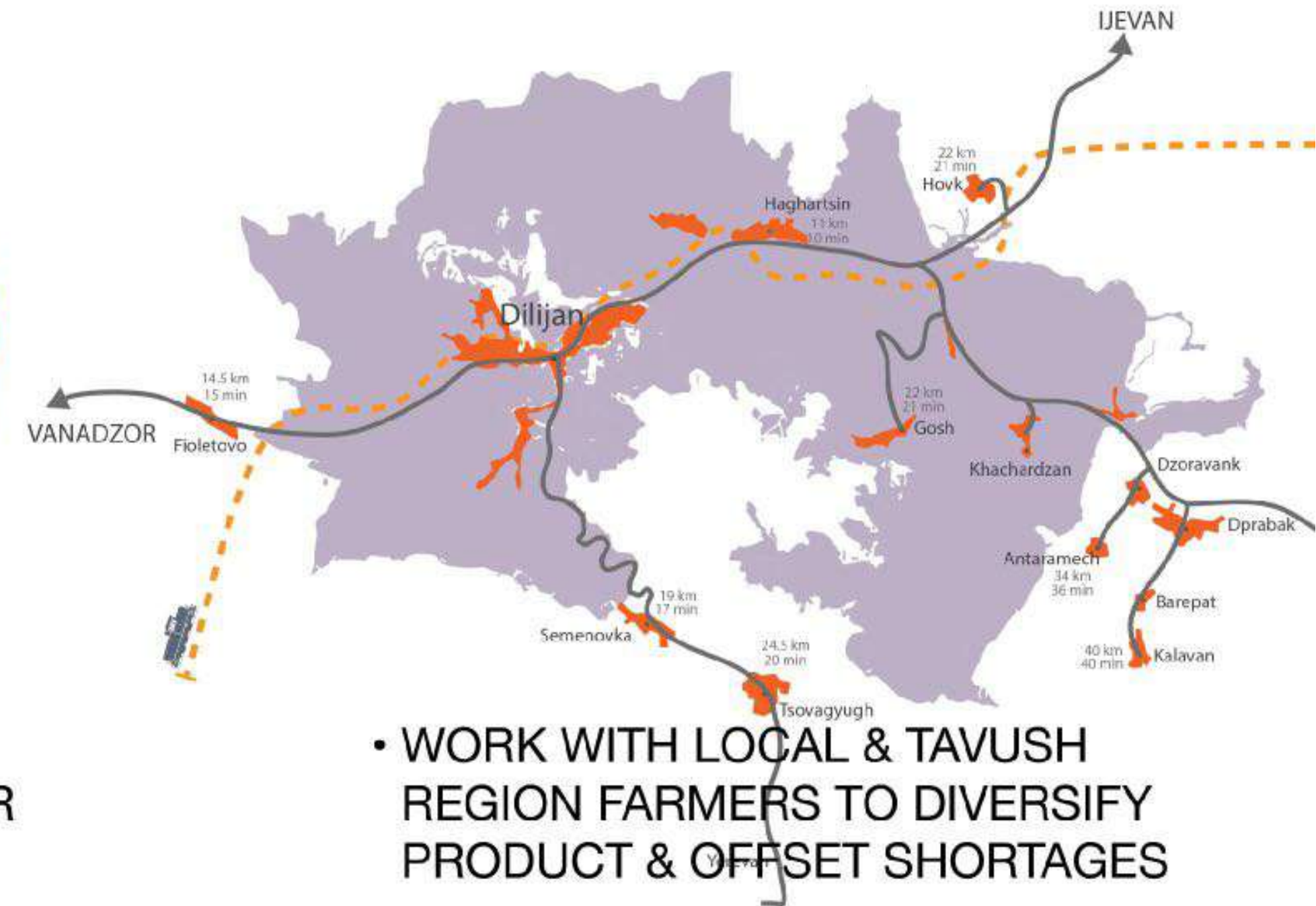
- ANALYZE ALL AVAILABLE FARMSTEDS & PRODCUTS
- ESTABLISH A FARMING COOP UNDER ONE 'DILI FARM' BRAND
- CREATE A BRAND (*guarantee sales to farmers and quality control to consumer*)

2. 'DILI' BAZAR



- RE-ESTABLISH DILIJAN'S FAMOUS & BELOVED BAZAR

3. 'DILI' FARMERS NETWORK



- WORK WITH LOCAL & TAVUSH REGION FARMERS TO DIVERSIFY PRODUCT & OFFSET SHORTAGES

SIGNATURE GASTRONOMY EXAMPLE

CHEF'S EXPERIENCE

MUSH-MUSH[®]

Taste (dishes) inspired by the mountainous terrain with modern serving touch and global reinvented details.



®

Mush-Mush

Chef's Garden Restaurant

NATURALLY DELICIOUS

DILIJAN: HOSPITALITY

ANALYSIS | OPPORTUNITY | RECOMMENDATIONS

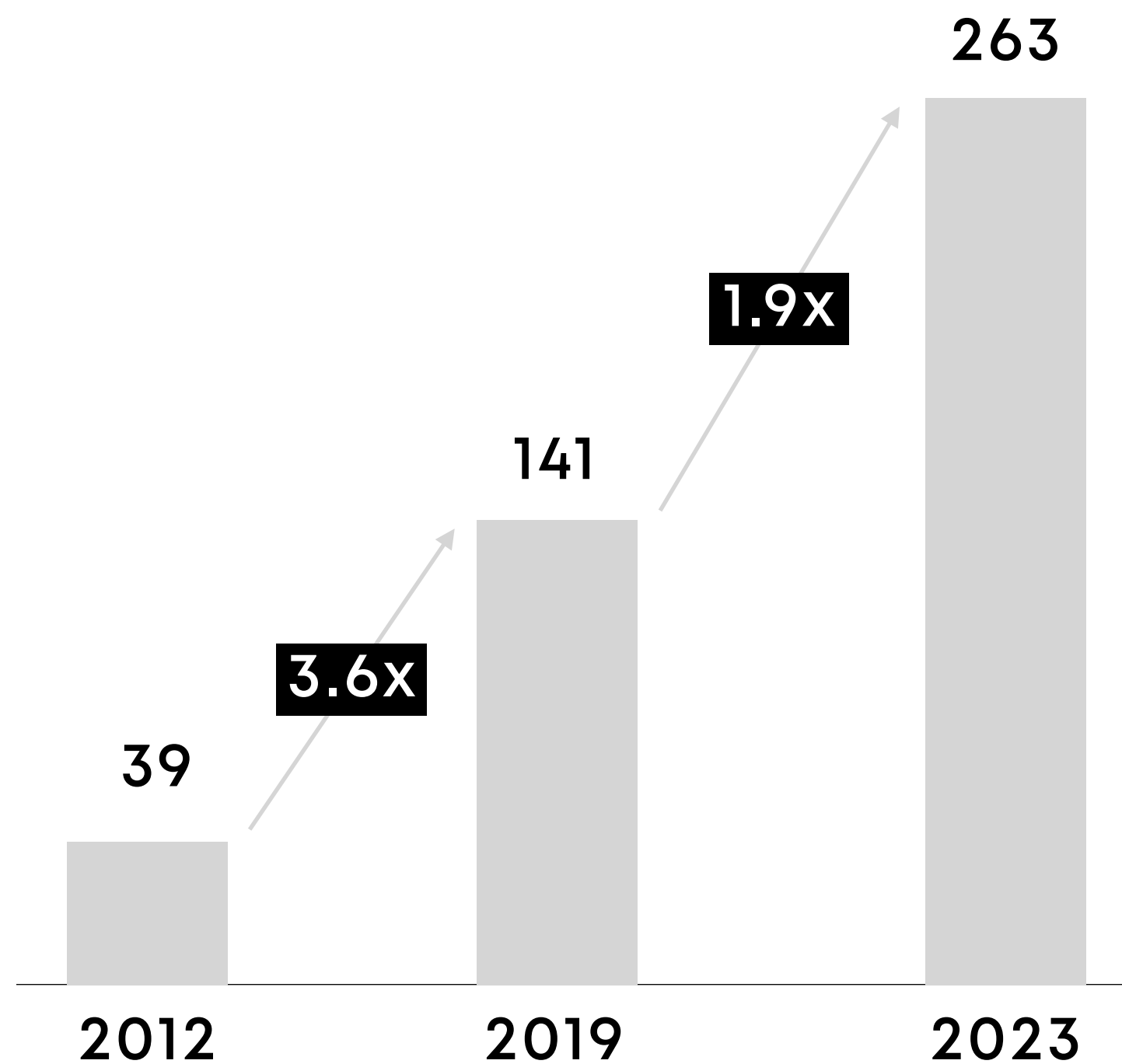
As of 2023, more than 260 hospitality sector units are operating in Dilijan. Yet, **economic activity is high concentrated, depriving major residential areas from potential tourism benefits.**



SPATIAL SATURATION

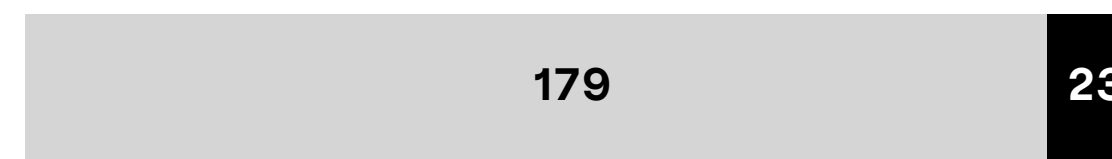
Hospitality units has been **consistently increasing**, even in the aftermath of The Pandemic and 44-day war.

HOSPITALITY SECTOR

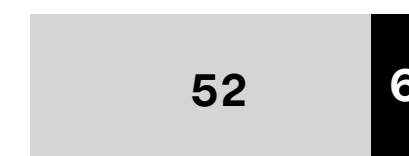


Meanwhile, approximately 90% of these facilities are **concentrated within the city limits of Dilijan.**

Hotels/B&Bs/Guesthouses

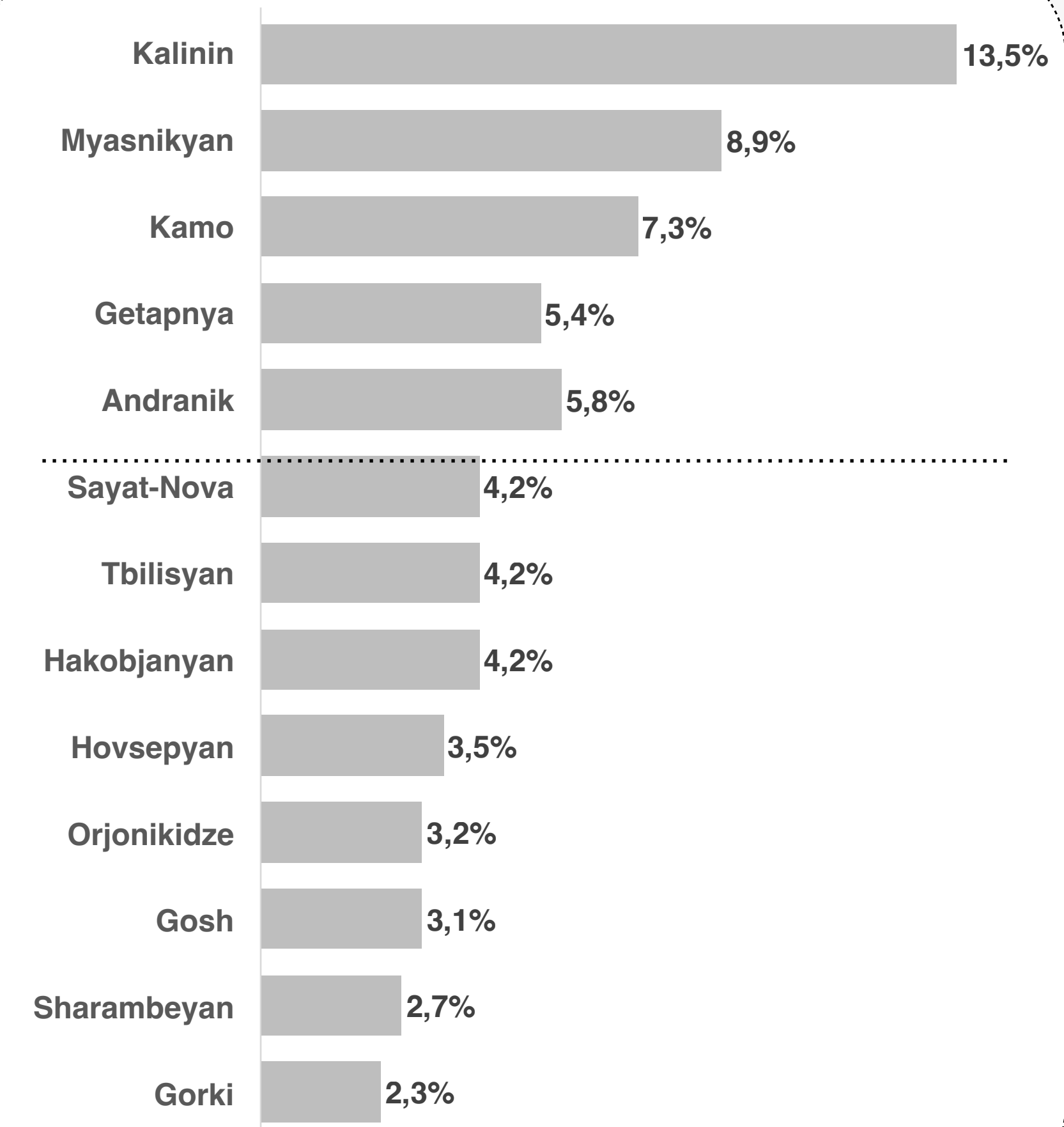


Restaurants/Cafes



- Dilijan city
- Surrounding Villages

And more than 40% - **in 5 main streets.**



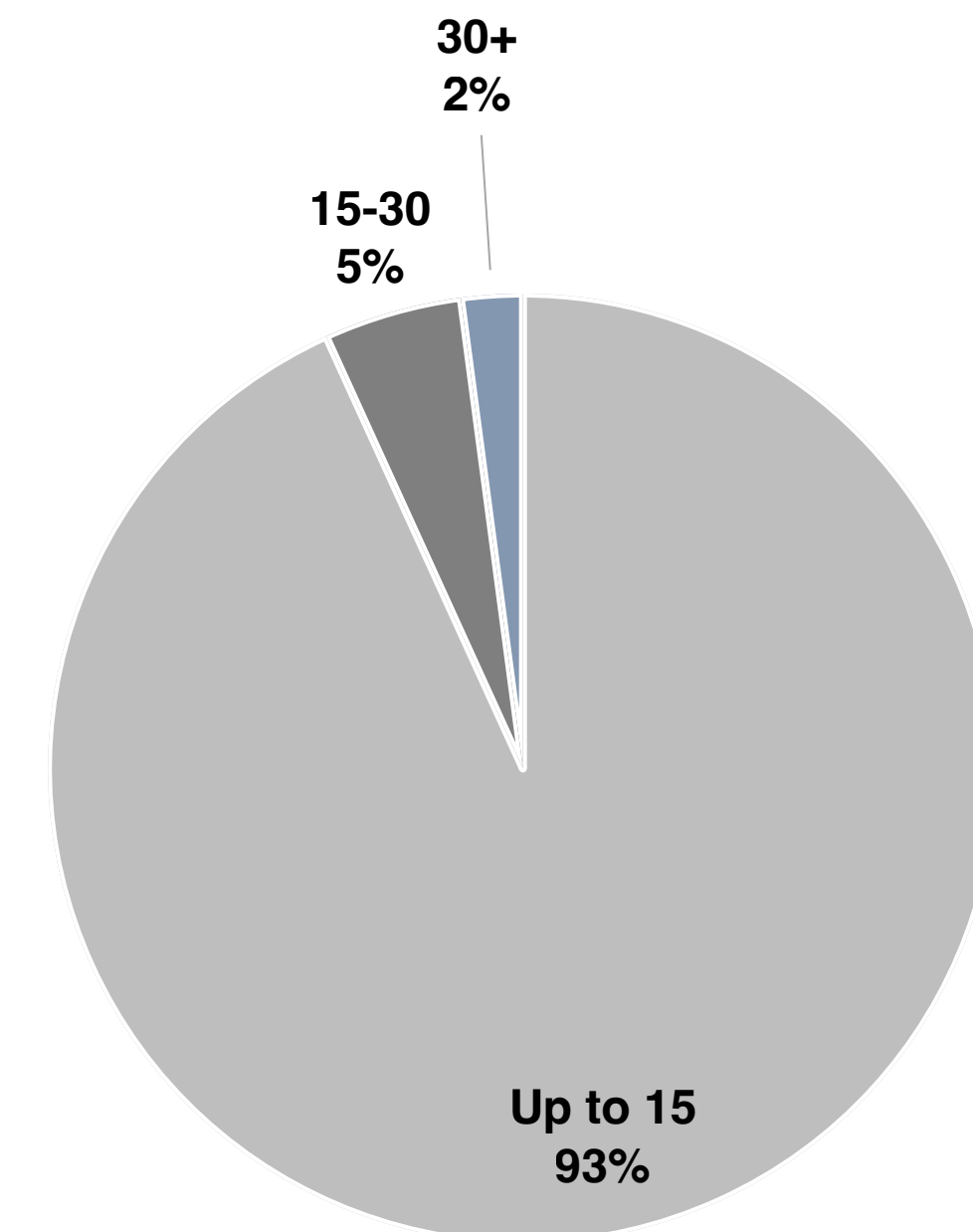
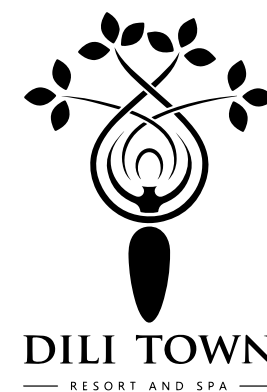
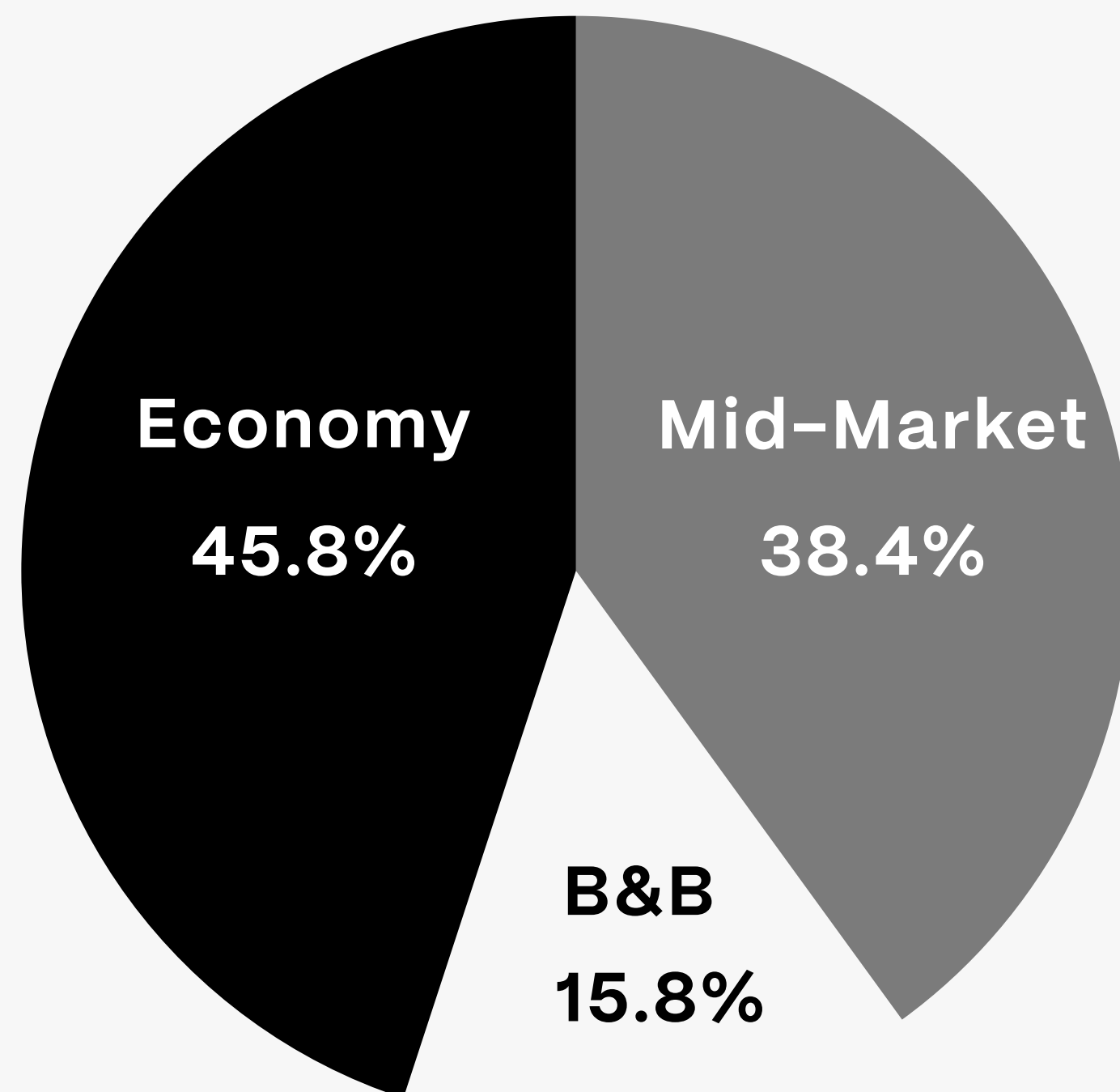
Total accommodation capacity has reached to 202 units/
~3,200 beds. **Yet, more than 60% is catered towards
visitors preferring economy class.**



LACK OF DIVERSITY

In between 2020 and 2023, **few notable hotels**
offering distinctive experience were established in
upper-midscale category.

Yet the units offering larger capacity
in terms of rooms remain scarce.



Hotel category is more about accommodation, with **limited offerings in terms of "in-house" activities.**



LACK OF DIVERSITY

Evening time out opportunities within or outside of the accommodation are limited.



% of hotels offering:



Up to 15
93%

**Common Pattern:
secluded rest
within the
hotel complex**

Best Western is the sole international hotel brand represented. **Destination hotel niche remains empty.**



LACK OF DIVERSITY

Best Western captures the significant part of MICE capacity in Dilijan.

The Hotels segment comprises both renovated former resort hotels and newly constructed establishments, usually smaller in size, varying from family-owned guesthouses and budget-friendly hostels up to few representatives of upper mid-scale hotels Among these is a selection of quality hotels tailored to meet the expectations of the mid and upper-middle market.



In the past, resort and sanatorium buildings embodied soviet modernism. They were either demolished or are still abandoned. Today, the aesthetics goes towards home-style, heritage or trendy minimalism.

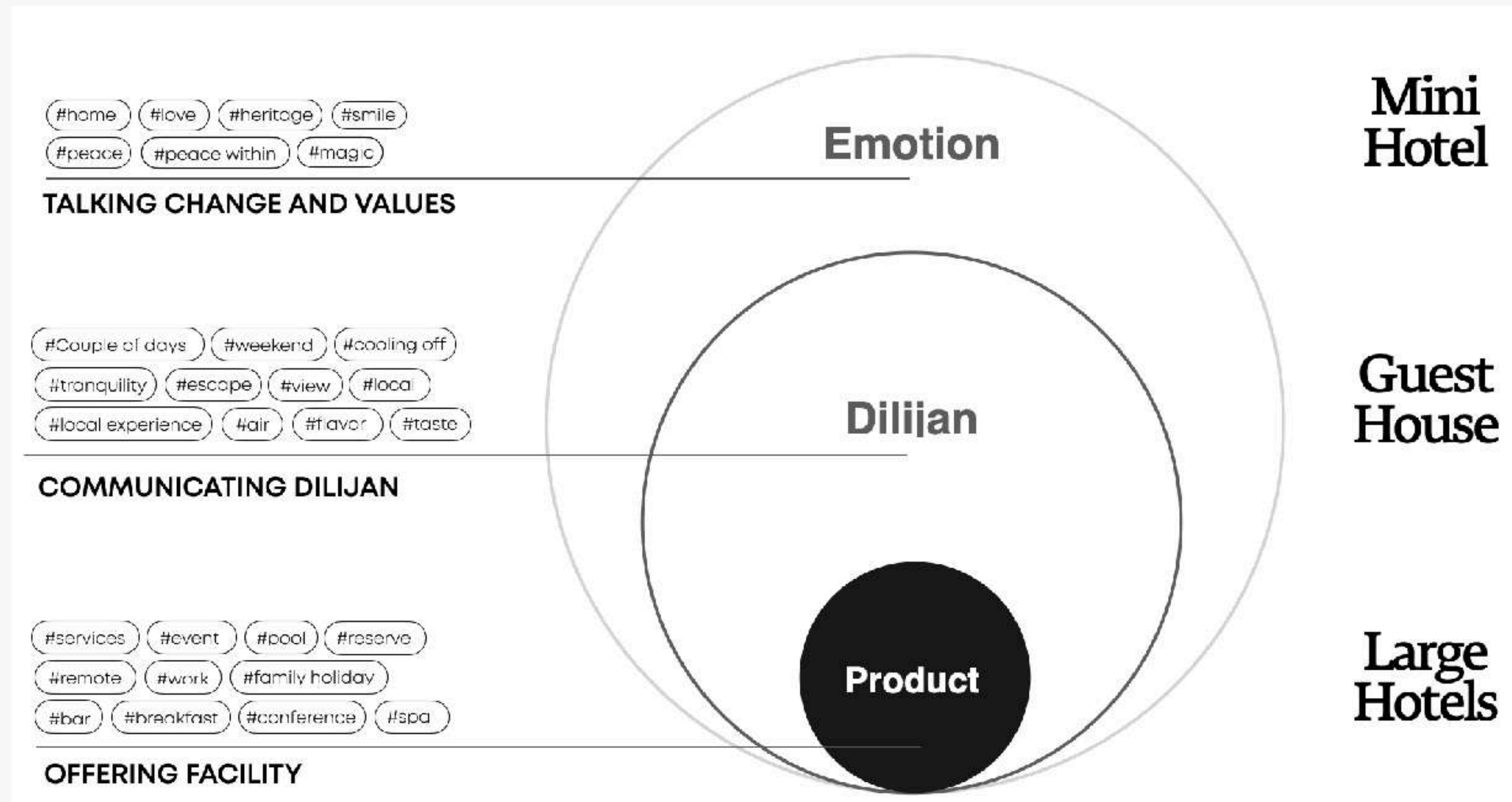
AESTHETICS

Preserving/reproducing traditional, local style
Embedding trendy, mostly Nordic design elements
Early 2000s' fashioned ambiance is most common



The existing actors of the Hotel Ecosystem, regardless of size, transmit similar promises. Capitalizing on "The View" is most common, and "Healing Air of Dilijan" still remains one of the "brands" preserved since Soviet times.

*Communication Audit of Hotel Facilities,
Message distribution by property size*

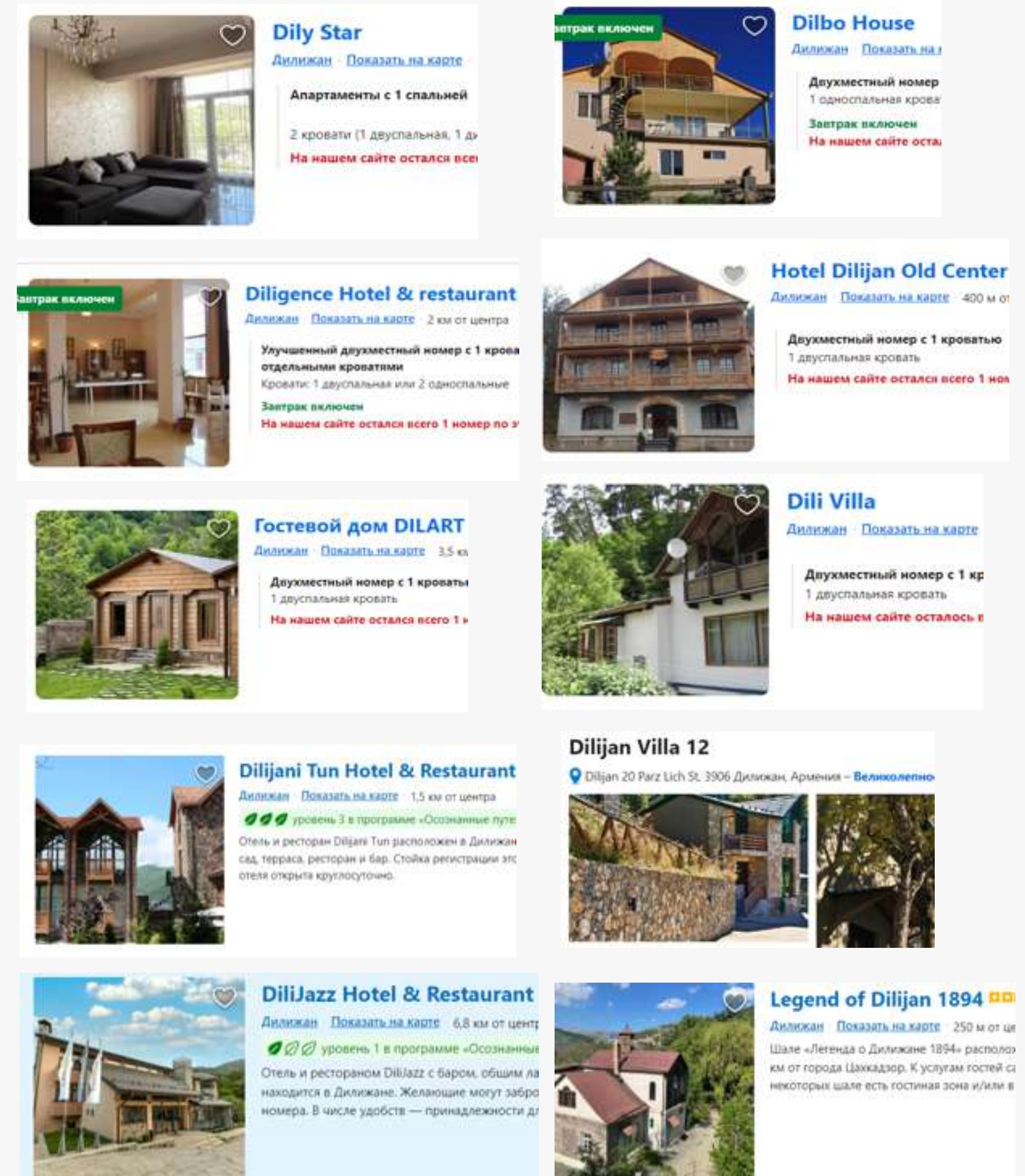
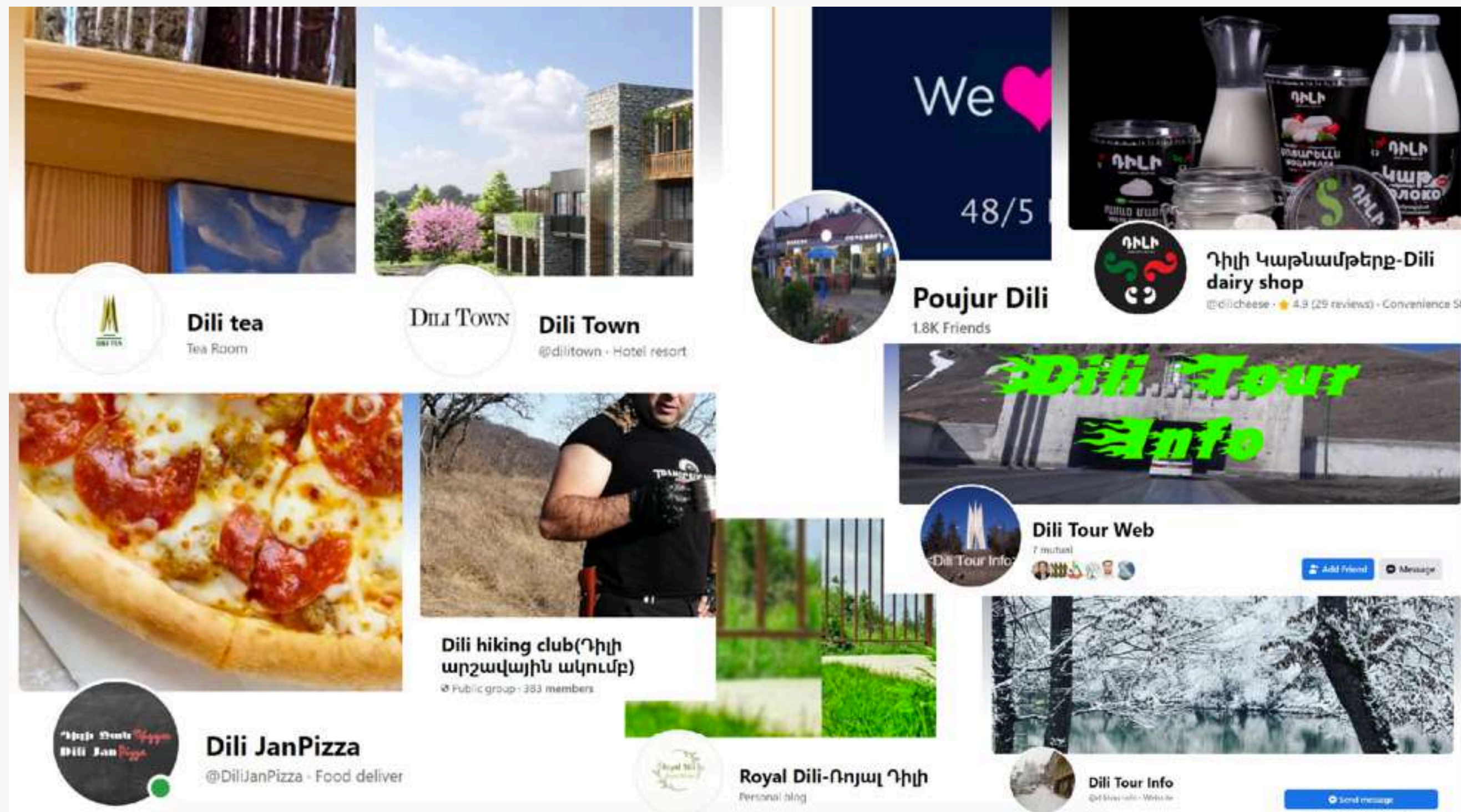


Dili-, Dili-Jan, Dilijan is the main asset and identifier. This ends up being overused without any other personalized idea behind. Some of the uses are even not quite appropriate.



LACK OF ORIGINAL CONTENT

Missing a unifying look and feel, often low quality communications.



Qualified human resources of various levels is an emerging issue. Investment in Training Opportunities/Partnerships are crucial.



LACK OF QUALIFICATIONS

Lack of trained and qualified personnel:

The development of tourism in the community has led to a great demand for waiters, tourist guides and service sector workers, as well as municipal planners and managers.

Training opportunities are crucial to raise the standard of customer service related industries, such as restaurants, hotels, tour guides, and other related amenities. This includes various skills, from knowledge of foreign languages to communication and service provision skills.

Lack of qualified supporting personnel in tourism and other client-oriented services (restaurants, hotels, tourism activities), healthcare (nurses, doctors), technical support (electricians, plumbers, cleaning staff), construction workers, and other.

Mindset Gap should be addressed to help locals understand how to participate in tourism beyond renting their apartments and working in the service sphere.

Here's a detailed look at how the community can help:

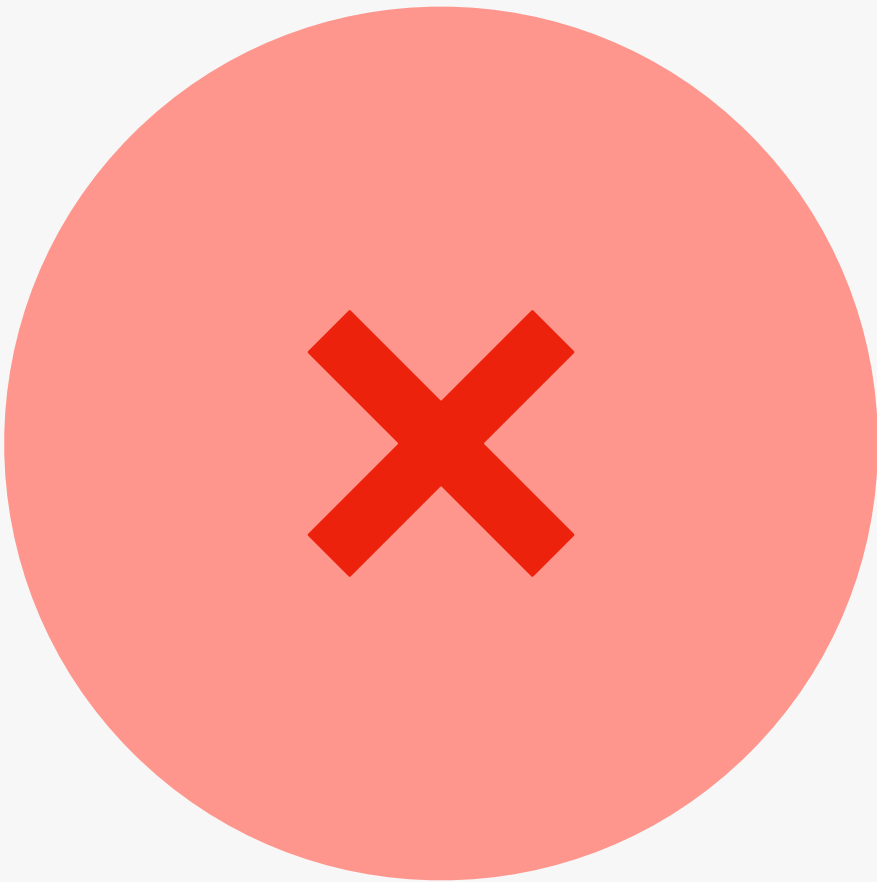
- ☐ Authentic Representation:
- ☐ Community-Driven Experiences
- ☐ Local Support and Engagement
- ☐ Economic benefits for local communities
- ☐ Environmental Stewardship
- ☐ Community-Driven Marketing
- ☐ Cultural preservation

Destination hotel niche remains empty.

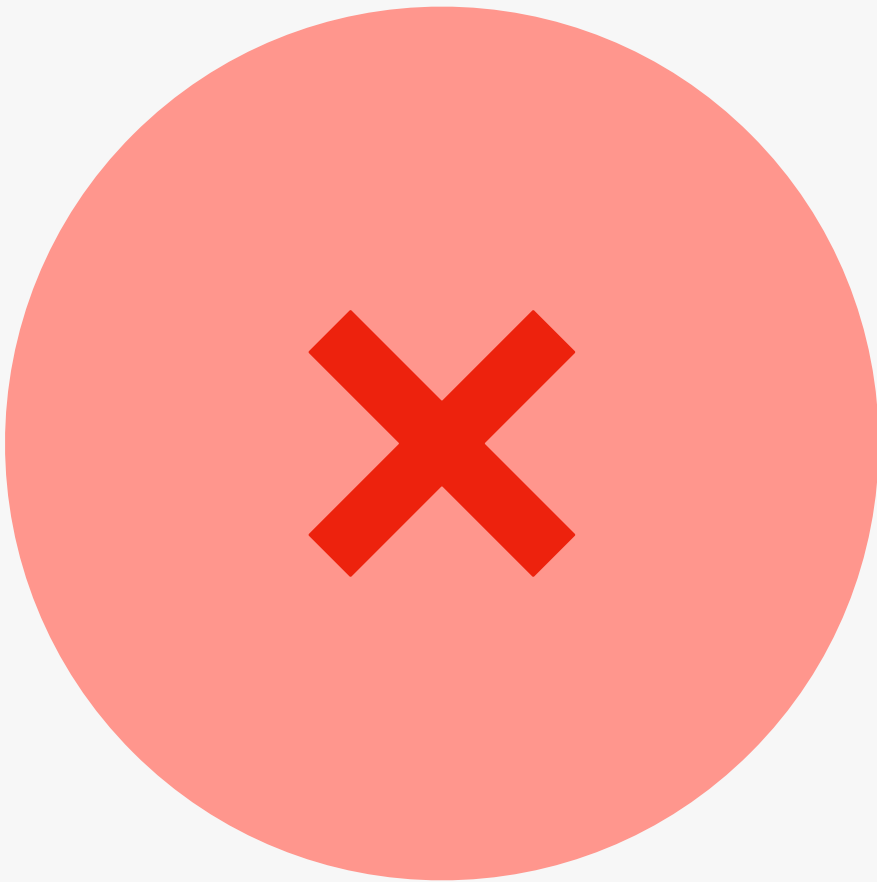
Destination Hotel category remains unexplored. The term is applied to authentic signature amenities or concept-driven boutique hotels that are deeply rooted in or by virtue of their idea are capable to redefine the destination appeal.

Boutique Accommodations & Wellness Lodges:
Boutique hotels, isolated eco-cabins, and luxury lodges that immerse visitors in nature and culture.

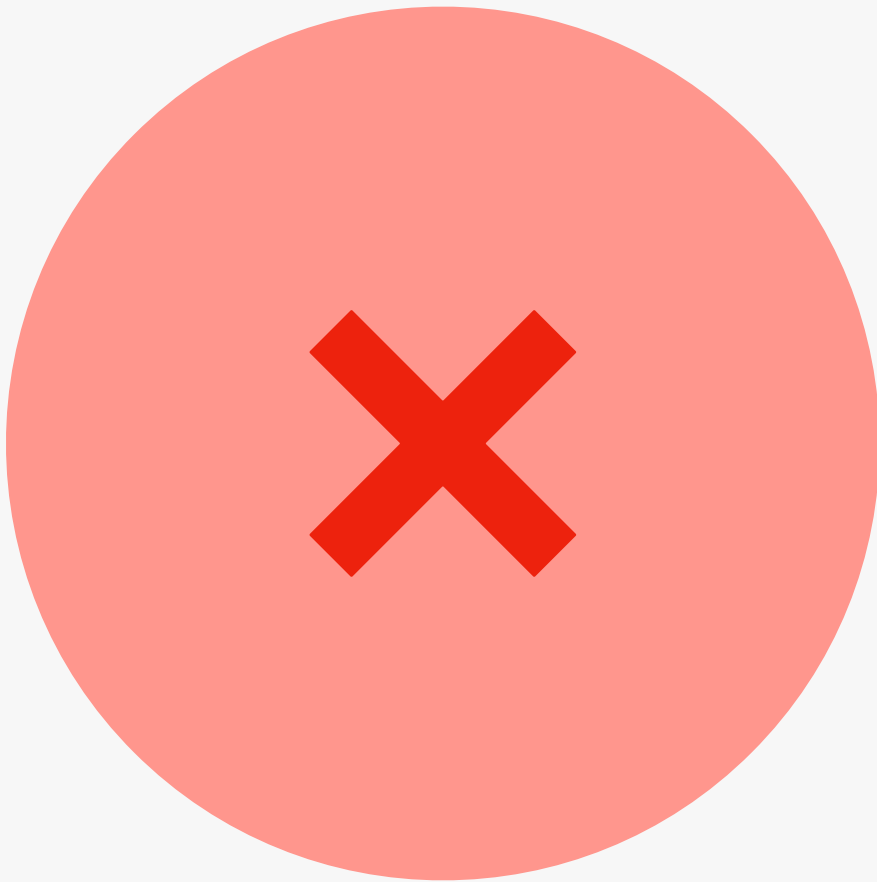
DESTINATION
HOTEL



SIGNATURE BOUTIQUE
ACCOMODATION



AUTHENTIC CONCEPT
EXPERIENCES & ACCOMMODATION

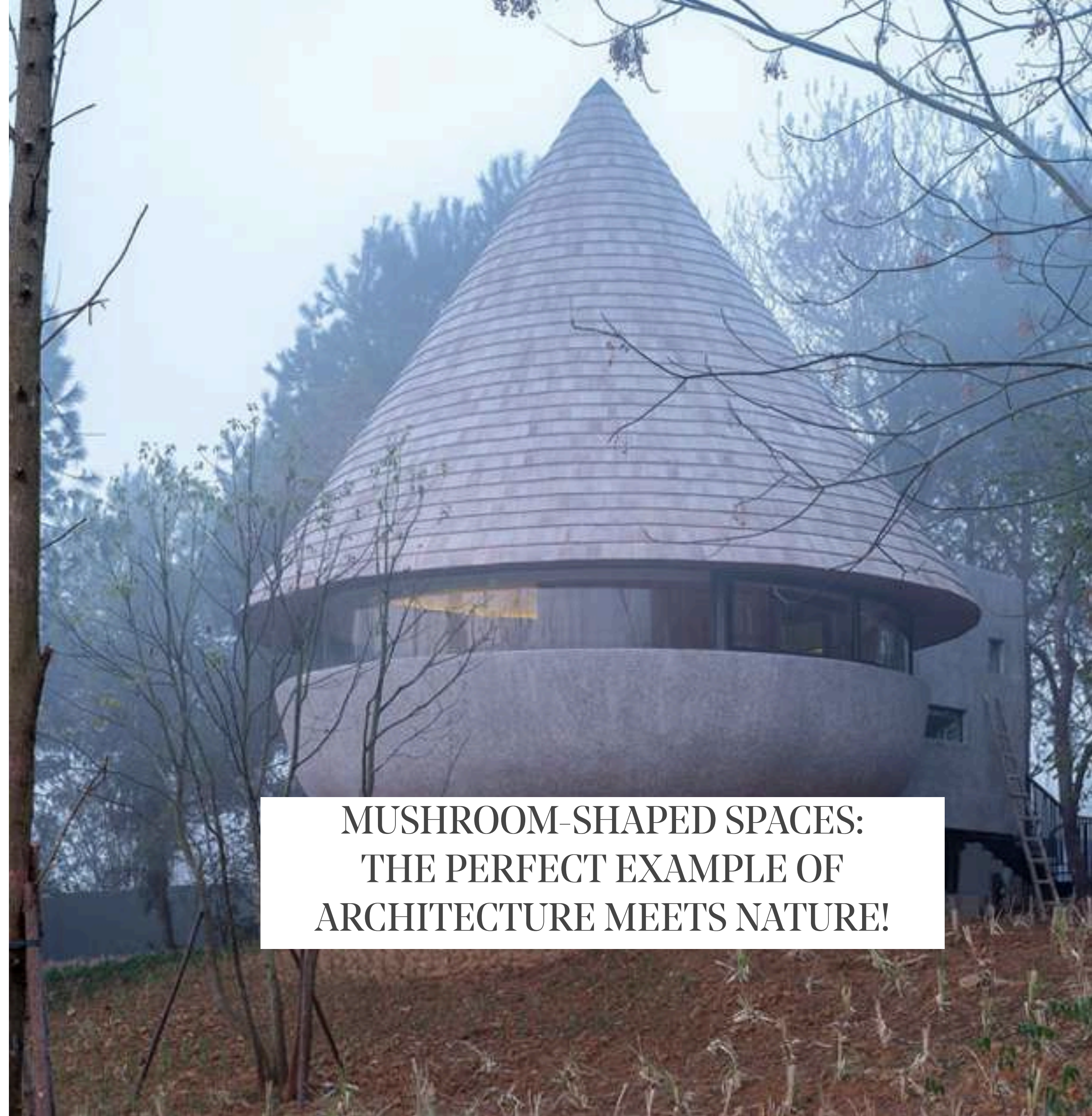


CONCEPTUAL ACCOMMODATION EXAMPLE

COTTAGE STYLE ACCOMMODATION

DETOX MUSH-ROOMS

Exploring the pleasures of the Dilijan National Park: ritualistic walks, digital detox and rejuvenation while staying in a local nature inspired accommodation.



MUSHROOM-SHAPED SPACES:
THE PERFECT EXAMPLE OF
ARCHITECTURE MEETS NATURE!

DILIJAN: NATURE

ANALYSIS | OPPORTUNITY | RECOMMENDATIONS

NATURE



WHAT WE HEARD

**WE VALUE OUR CLEAN AIR,
OUR BEAUTIFUL
MOUNTAINS, AND NATURE**



**INVESTING INTO THE NATIONAL
PARK'S TOURISM
INFRASTRUCTURE WILL
POSITIVELY IMPACTS ECONOMIC
GROWTH OF LOCAL COMMUNITIES.**

NATURE: Opportunity

CREATE A
FOUR-SEASON
ADVENTURE &
RECREATIONAL
ACTIVITIES IN
DILIJAN'S
NATIONAL PARK



SPRING



Hiking



Zipline



Mountain
Climbing



Wildlife
Watching



Horseback
Riding



Mountain
Biking



Camping



Alpine
Slides



SUMMER



Hiking



Zipline



Mountain
Climbing



Wildlife
Watching



Horseback
Riding



Mountain
Biking



Camping



Alpine
Slides



FALL



Hiking



Zipline



Mountain
Climbing



Wildlife
Watching



Horseback
Riding



WINTER



Snowshoeing



Sledding



Snow
Tubing



Snowmobile



Horse
Sleigh



Cross Country
Skiing



Snow
Biking

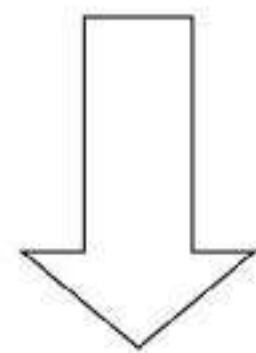
NATURE : Targeted Tourist

DILIJAN NATIONAL
PARK WILL OFFER
YEAR-ROUND
ACTIVITIES FOR
VARIOUS
ADVENTURE
TOURISTS.



Casual

40%

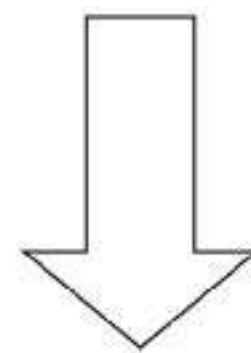


\$400



Familiar

35%

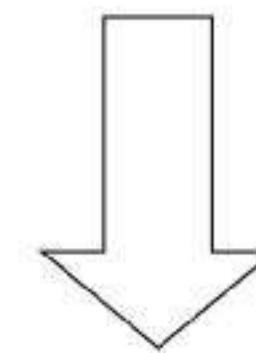


\$100



Flow Through

20%

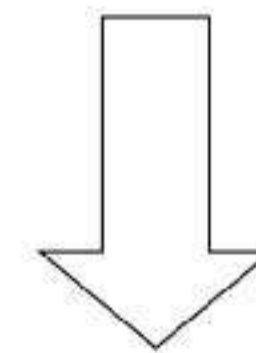


\$500



Premium
Experience

5%



\$900

AVERAGE
SPENDING

NATURE : Creating Trails

1.

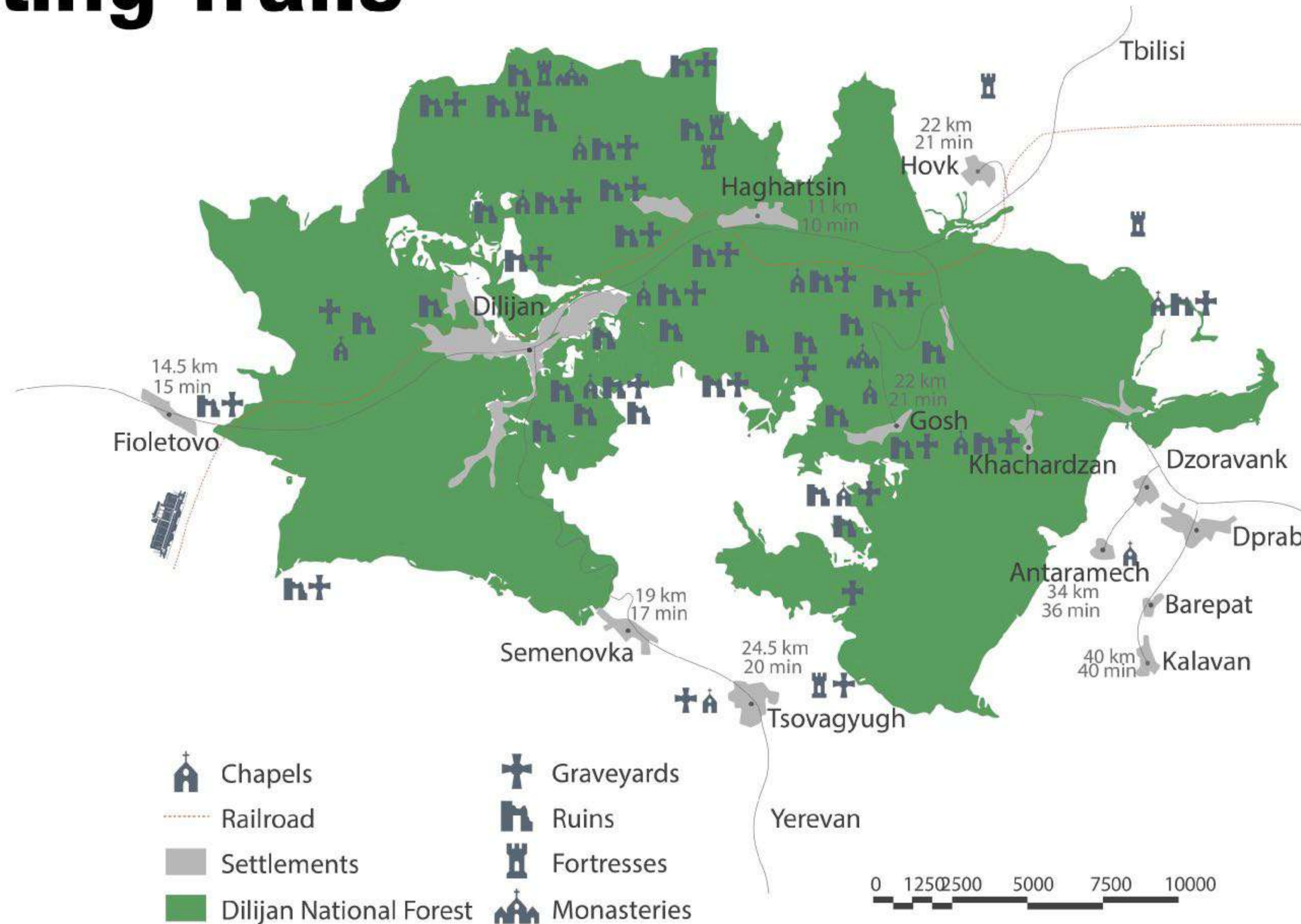
ESTABLISH MULTI-USE TRAILS

- Hiking
- Biking
- Horse Back Riding
- Skiing
- Snow Shoing
- Snowmobile Riding

2.

CREATE CLEARLY MARKED WAYFINDING

- Create a Complete Trail Map
- Create an APP for easy access
- Identify all Site Seeing aspects



THEMED EXPERIENCES EXAMPLE

- MUSHROOM HUNTING
- FORAGING FOR WILD HERBS,
GREENS, FRUITS
- SEASONAL HERDING OF
COWS AND SHEEP
- BREAD MAKING



TRUFFLE HUNTING & WINE TASTING TOUR

While Tuscany is often associated with exceptional wines, it is also renowned for its truffles.

FROM 10:00 A.M. TO 5:00 P.M.
SAN MINIATO

SHARED

CHECK
AVAILABILITY

FROM 210 €



TRUFFLE COOKING CLASS

Discover the joy of cooking with us this remarkable ingredient.

10:00
SAN MINIATO

SHARED

CHECK
AVAILABILITY

FROM 210 €

INTERNATIONAL COLLABORATIONS EXAMPLE

Invite artists who have strong international recognition and the ability to attract cultural pilgrimages for urban installations that involve the entire city.

Develop old rehabilitated spaces into artist and craftsman studios. Invite artist residents to Dilijan.



DILIJAN: WELLNESS

ANALYSIS | OPPORTUNITY | RECOMMENDATIONS

Recognizing the increasing demand and key geographic opportunities, **we see Dilijan** as a prime destination to attract high-end tourists seeking more than just a spa – **a complete wellness, healing, and relaxation experience, backed by outstanding service and quality.**

The areas in and around Dilijan are perfect for offering exclusive privacy and escape from the urban environment, with the added value of natural springs and thermal waters. For culture enthusiasts, Armenia provides a rich tapestry of architectural, archaeological, and historical attractions. For adventure seekers, the region is ideal for hiking, mountain climbing, horseback riding, mountain biking, and paragliding, all set against stunning landscapes that can be enjoyed year-round. Dilijan can make the experience more complete.

Unfortunately, with the Soviet regime the established resort/wellness infrastructure was gone as well - most of the properties managed to keep only the hotel component, while **healthcare-medical component was forced out. The existing human capital was also lost, and the overall medical care services of the city were of a very low level. It's time to revive that legacy in a modern way.**

WELLNESS



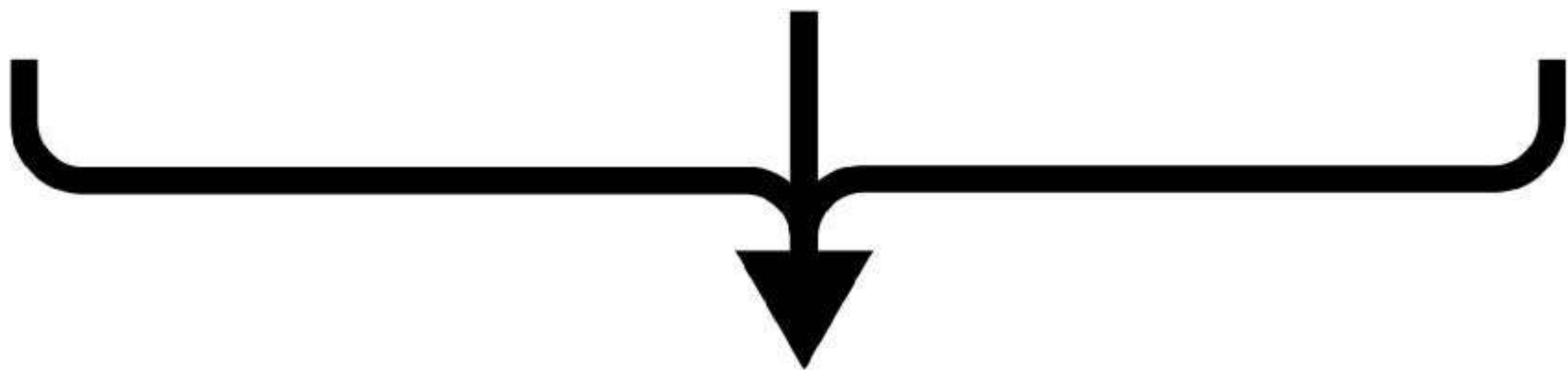
**CLEAN AIR
& NATURE**



**DILIJAN
MINERAL WATER**



**SANATORIUM
LEGACY**



**Current Hospitality Sector is NOT
Focused on Capitlizing on These**

WHAT WE HEARD

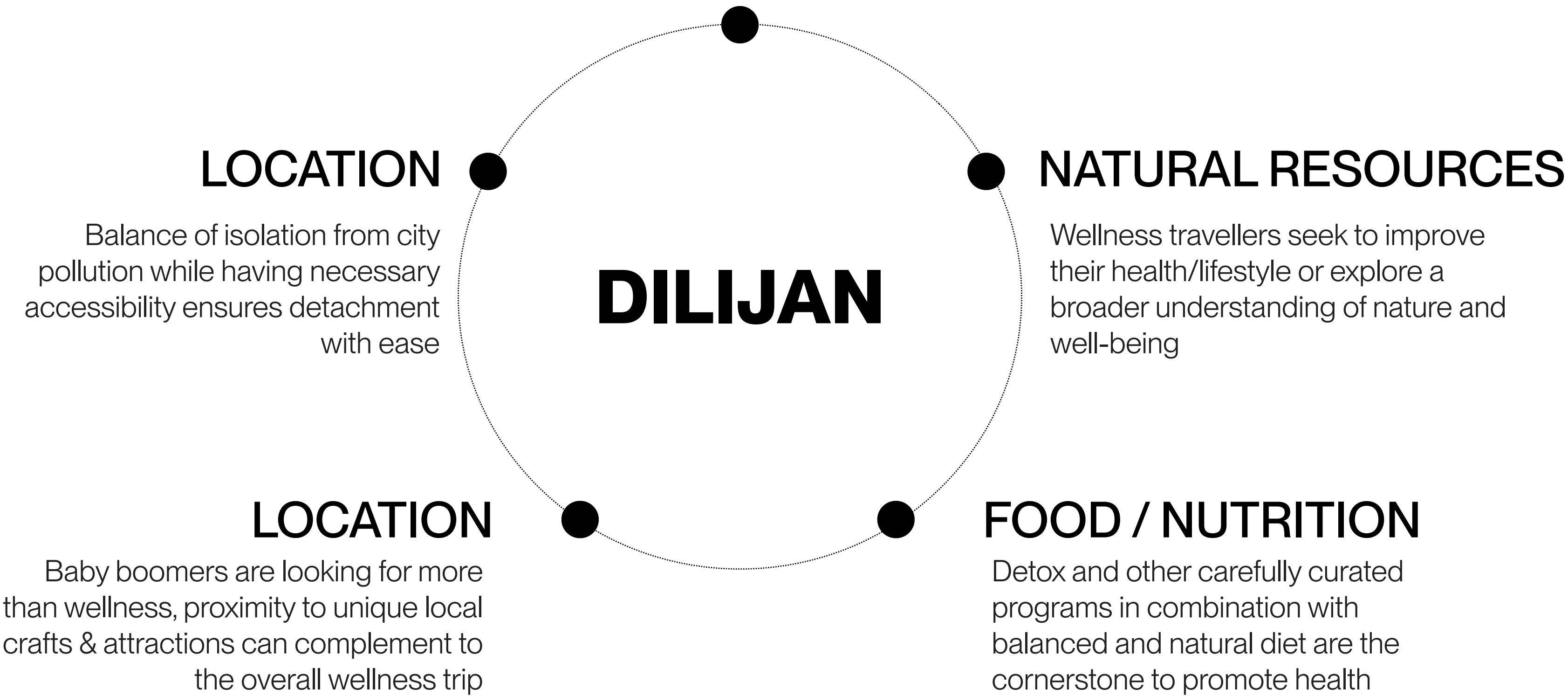
**OPPORTUNITY TO
LEVERAGE DILIJAN'S
LEGACY AS A CITY OF
HEALTH AND WELLBEING**



ASSET FACT CHECKING VALIDATES DILIJAN'S POTENTIAL TO ANCHOR A WELLNESS DESTINATION

LEGACY / CULTURE

Possessing cultural resources to create the sanctuary
experience for ultimate relaxation and mind & body
connection as well as cultural immersion



Why to embrace Wellness Tourism?

Wellness tourist is a **high yield market** where travellers pay more.
Regular tourism is the main driver of wellness tourism (secondary wellness tourism)
Majority of wellness travellers worldwide are domestic tourists

Wellness Tourist Behaviors

Secondary wellness tourist:

A tourist who seeks to maintain wellness while traveling, or who participates in wellness experiences while taking any type of trip for leisure or business.

Primary wellness tourist:

A tourist whose trip or destination is primarily motivated by wellness.

Domestic wellness tourist:

A tourist who is traveling within their own country with an overnight stay.

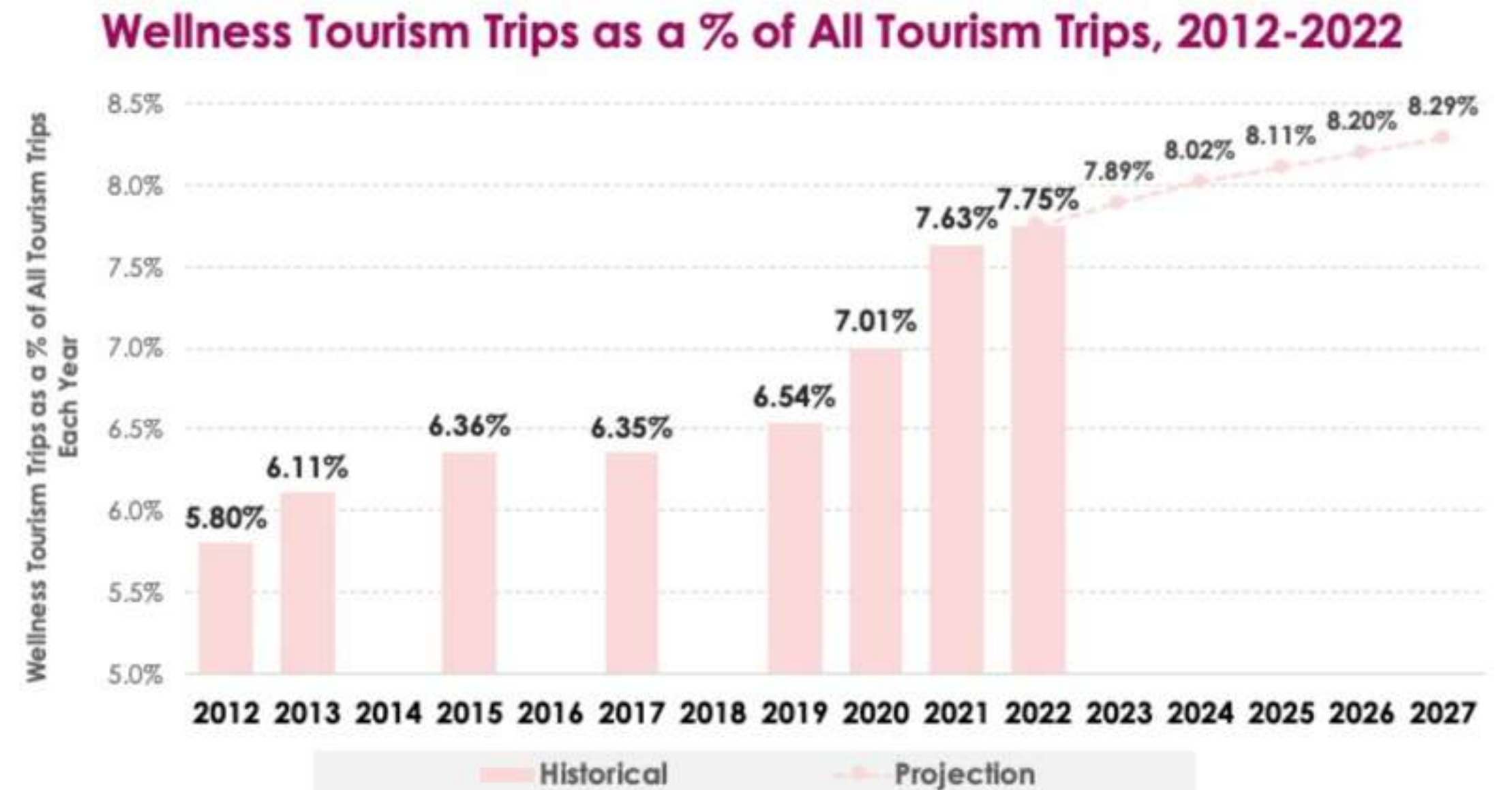
International wellness tourist:

A tourist who is visiting from abroad with an overnight stay.

Wellness tourism

key insights

- In 2022, the 819.4 billion wellness trips taken (both internationally and domestically) represented 7.8% of all tourism trips—a much larger share of the market than just a decade earlier. Wellness trips are projected to rise to 8.3% of all tourism trips by 2027.
- Wellness tourists **consistently spend more money** than the average tourist, although the premiums for different types of wellness tourists have shifted over time.



Source: Global Wellness Institute (wellness tourism) and Euromonitor (all tourism). These figures combine both international/inbound and domestic, and both primary and secondary, wellness tourism trips.

Tourism Flows to Armenia as The base for addressable market

According to the Global Wellness Institute, 7.8% of tourists travel for wellness. Additionally, according to the Statistical Committee of Armenia, 57,000 people travel domestically for wellness, making the total addressable market equal to 236,000 people.



WELLNESS : Opportunity

In 2021, the global wellness tourism industry was valued at \$850.55 billion and is expected to grow to \$2.1 trillion by 2030.



DILIJAN: URBAN

ANALYSIS | OPPORTUNITY | RECOMMENDATIONS

CHALLENGES & EXPERIENCE PECULIARITIES

Analysis of touristic offerings, hospitality landscape and urban environment of Dilijan were grouped and presented in the context of observed challenges and obstacles.

#1

LACK OF
CONNECTIVITY
AND URBAN
COMFORT

#2

NO SENSE OF
ARRIVAL

#3

SPATIAL
SATURATION

#4

DEGRADING
INFRASTRUCTURE

#5

URGE FOR URBAN
REGENERATION

#6

CONSISTENCY
LOOK & FEEL

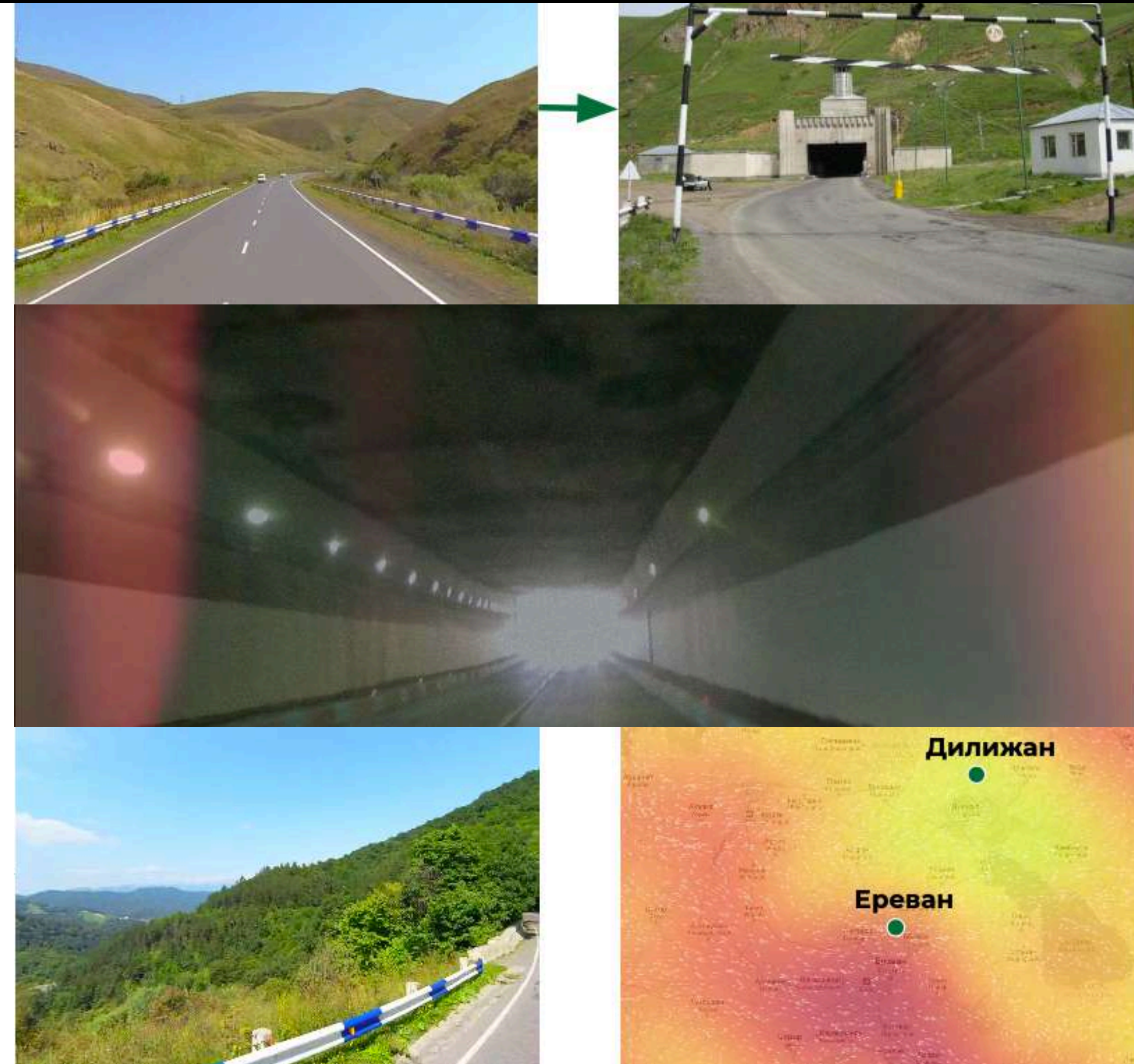
**First imprinting: Nature, total change of scenery.
Sense of arrival cascades several times: gradually
spotting buildings and yet not being able to identify a city**



**MIXED SENSE
PRE-ARRIVAL**

Anticipation of What's Next

1. Reaching Dilijan from Yerevan (dominant route) is a **real shift**: the scenery before the tunnel shifts right after exit, welcomed by often cloudy or rainy scenery. The Climate becomes mild, cool, soothing – it makes a statement and a promise.
2. There is a common narrative as "Dilijan Views". Although the air change becomes obvious, the City remains undiscovered due to the area's landscaping specifics.
3. Tunnel plays a major role in building a perception and a pre-first impression acting as a transporter.



View to National Park upon arrival

Heat Waves according to Yandex Weather

**First imprinting: Nature, total change of scenery.
Sense of arrival cascades several times: gradually
spotting buildings and yet not being able to identify a city**



**MIXED SENSE
PRE-ARRIVAL**

**PROPOSAL FOR
IMPROVEMENT:**

**PUBLIC SAFETY
EXPERIENCE
STRUCTURAL INTEGRITY**

DRIVING AND PUBLIC SAFETY

EARTHQUAKE SAFETY

VENTILATION IMPROVEMENTS

LIGHTING

FIRE FIGHTING

DRAINAGE & WATERPROOFING

MAINTENANCE

GATEWAY

TUNNEL DESIGN & EXPERIENCE



Corn at the Road is one of the signature experiences just before the arrival. The consistency in translating the look and feel integral to Dilijan's aesthetics becomes inevitably crucial.



INCONSISTENCY

First impression after the tunnel exit is the Natural landscape on both sides – up and down. The first major man-made structure happens to be the Corn booths which makes their role in building the sense of place crucial.

Today, we witness a mixed picture: newly established corn booths, old coca-cola umbrellas paired with various inconsistent items – degraded wooden booths, visually irrelevant I Love Dilijan sign, etc.

Having such a great symbolic bearing, there are several scenarios: 1) designed to be the beacons of the city aesthetics, 2) designed as a completely diversified art objects/installations, 3) be completely consistent with the surrounding nature/eco environment through use of shapes and materials.

Brief Observation Note:

Introduced booths, unfortunately, create obvious disruption with the local ambiance through their synthetic aesthetics.

The materials and shapes, as well as logos make them look like municipal objects, rather than local community.

Based on seller feedbacks, booths happen to be not well adapted to their needs and practical requirements of the space, ex. ventilation, etc.

Based on user experience observations, user experience is not adapted for the customer experience, who should still use the sitting areas outside the booths. This ends up again with mixed use materials in one place: new booths and old plastic chair with umbrellas.

Newly introduced booths did not receive positive resonance among professional communities.



Sense of Arrival remains weak and unfulfilled: city remains hidden, the roundabout becomes the first “institutional” symbol (from both Yerevan and Tbilisi), often confused with city center and signaling “almost there” feeling.



**NO SENSE
OF ARRIVAL**

The inhomogeneous and low-quality booths at the city entrance give a fragmented, low quality impression. The quality and design of these booths lack the visual unity needed to make a memorable mark upon arrival, reinforcing a sense of randomness rather than a clear, defined destination identity.



The main visual symbol, the City Park, remains partially concealed by the surrounding greenery, particularly from the Yerevan route. This subtle integration of urban spaces within the natural landscape leaves the city's entrance experience less defined and understated.



Due to its natural landscape and existing urban layout, Dilijan has a decentralized structure with no “perceived” city center.



URBAN SPECIFICS

Dilijan is a linear city located alongside the M-4 and the M-8 highways. The city's key institutions are scattered along its main roads and areas, rather than concentrated in a singular urban center. This creates a unique organizational flow where clusters of activity emerge, centralizing services and attractions in distinct, self-contained areas rather than a unified city core. This layout enhances the experience of gradual discovery but also challenges the sense of urban cohesion.

At this moment, Dilijan's official center is stretched and hidden inside. Meanwhile, commonly city center gives the city a sense of destination, arrival, and a sense of place around which a hub of various public, private and recreational activities usually concentrate.



City Park and main activity



Administrative Center



Walkability and relaxed city exploration is still an issue, originally forced by natural relief of the place, yet maintained by insufficient pedestrian solutions.



WALKABILITY AND SAFETY

The topic of poor pedestrian facilities comes with poor safety standards – inadequate paved roads, absence of thought through pedestrian passings resulting in uncontrolled road crossings, overall poor road and street management.

Insufficient public transport capacity, poor levels of efficiency and service, yet transport is crucial to explore sights that are commonly far from each other.

Poor bus station interchange facilities and drop off facilities.

Oversized junctions: the two main intersections along M8 and at the crossing point between M8 and M4 appear very hard to be crossed and stand out as a barrier for pedestrian accessibility.

Absence of a workable plan or transport framework and ineffective decision-making structure.

Existing road network lacks planted boulevards with pedestrian walkways. Claiming historical heritage, Dilijan does not have a space with courtyards and pedestrian-only pathways.



Figure 2.17.28. Analysis of Existing Sidewalks

Aghstev river is a major asset to the city's overall view, both in terms of providing familiarity and infusing urban charm. Yet, in its current state it remains "unappealing".



**CITY WITH
A RIVER**

Dilijan is a city with a river – a huge value and a potential symbol is not spotlighted enough as there are unresolved sewage issues.

Aghstev is separated from the park by a broken driveway (Tsaturyan street) and concrete walls blocking the view of the water. It is the broken road and the wall that are now considered the embankment of the river. Since there is no asphalt on the roadway along Aghstev, local taxi drivers prefer to drop off passengers at Mimino ("there is no further road").



Garbage in the river



The wall blocking the view

Image Source: Urban Analysis for Dilijan City Park Project, Impulse Management Company



Ref: River as a Public Space and City Symbol

Among currently available public spaces in Dilijan, City Park is the only venue with constant influx of visitors due to uninterrupted walkability and program of events.



PUBLIC SPACES AND PARKING

Dilijan City Park is the major and probably the only place that can be labeled as a public space as the main concentration of services, social infrastructures and attractions are located around/in it. Dilijan City Park is undergoing phased changes.

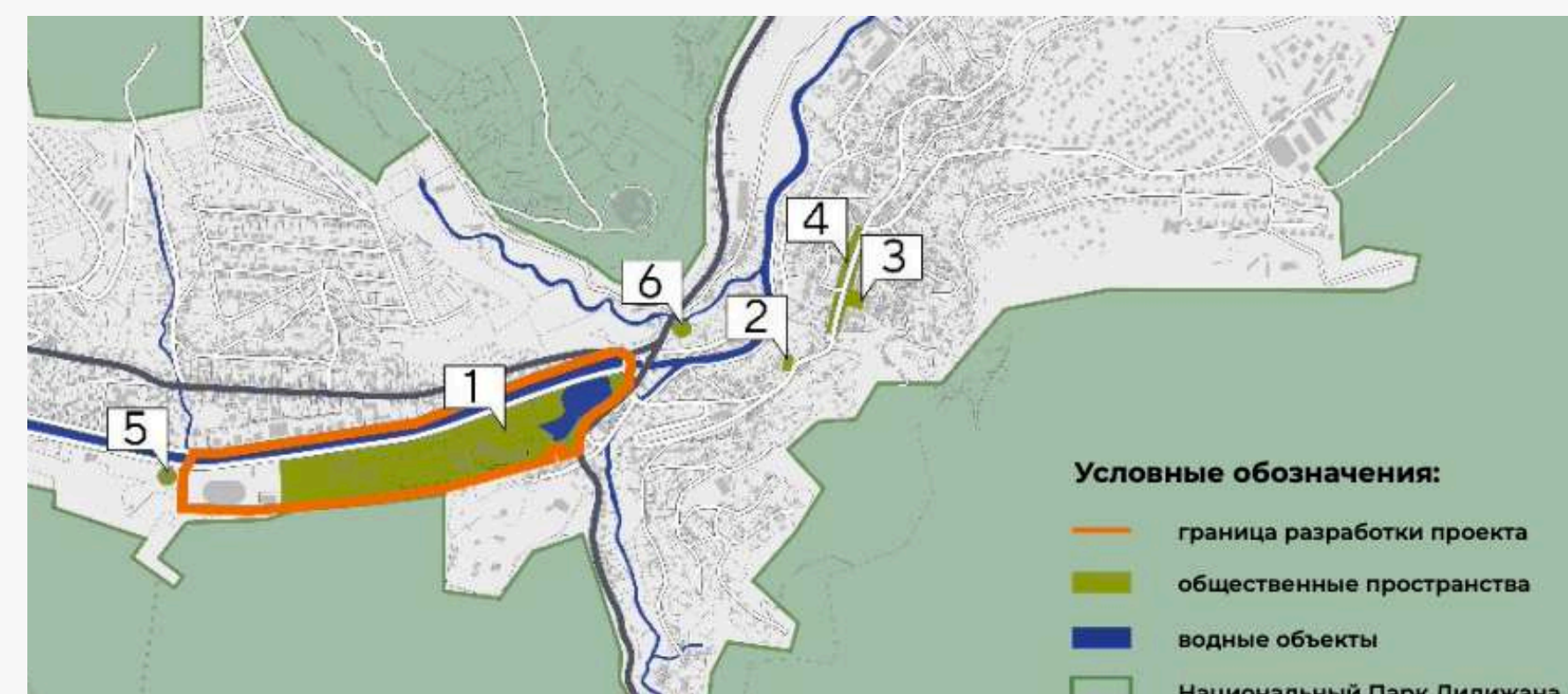
The rest available spaces rather function as meeting points, like, for example, the central street and the main square, as well as the sites near the memorials.

Locals sometimes gather in the amphitheater on Myasnikyan Street, and city events are also occasionally held there.

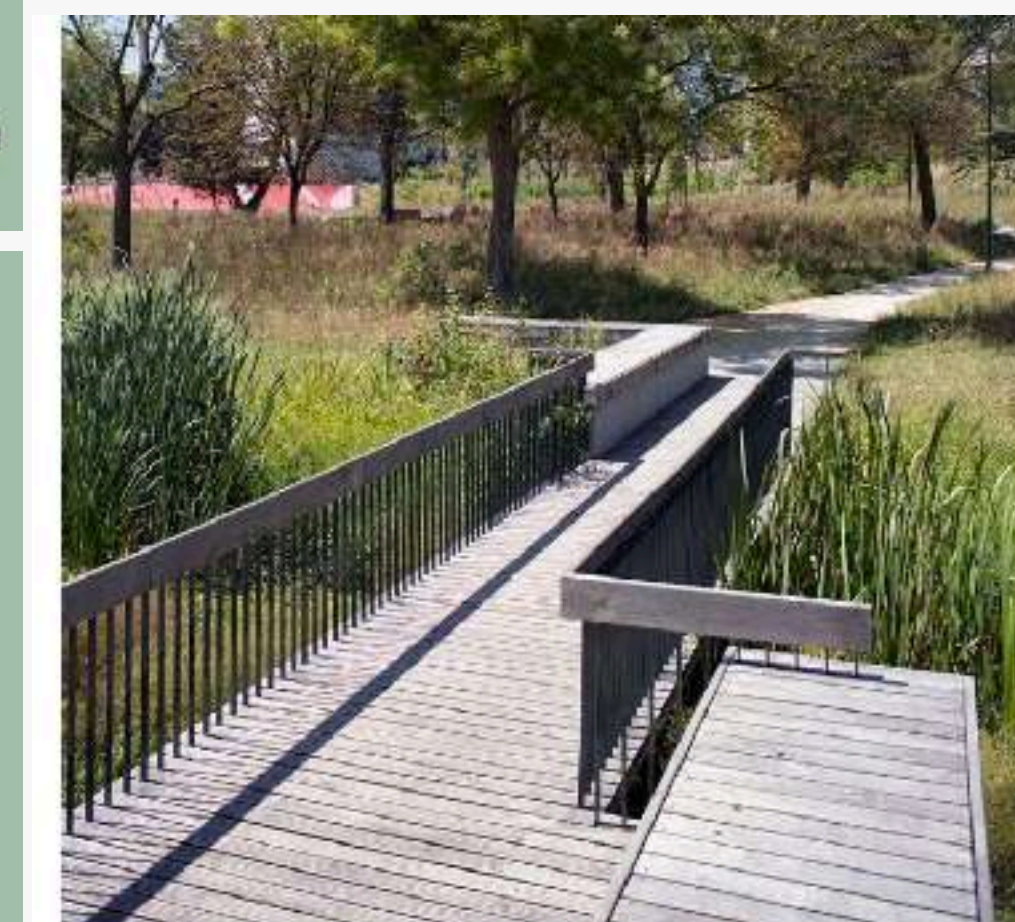
Rotonda used to be one of the iconic places.

Common practice of reinventing bridges as public spaces in modern cities are untapped potential.

Absence of parking management is a great issue, especially in the context of big events and festivals.



Reconstruction of existing bridges



Bridge as a public space

The signature architectural appeal of Dilijan is an invaluable asset which can not be understated in building a recognizable destination. Today, the picture and ambiance is fragmented.



**URGE FOR URBAN
REGENERATION**

Due to the absence of centralized preservation policy, the historic integrity of the city has been compromised – through lack of maintenance old buildings have been modified losing their historic value, some are even demolished or replicated with modern building of various interpretations of the old style. This is an effort by modern developers to infuse the old charm of the city into their new establishments.

The Tufenkian Heritage Resort is a recent conversion and reinterpretation of the historic district, which is one of the most successful examples of historic preservation. Even the very short pedestrian street still serves as the main touristic attraction today.



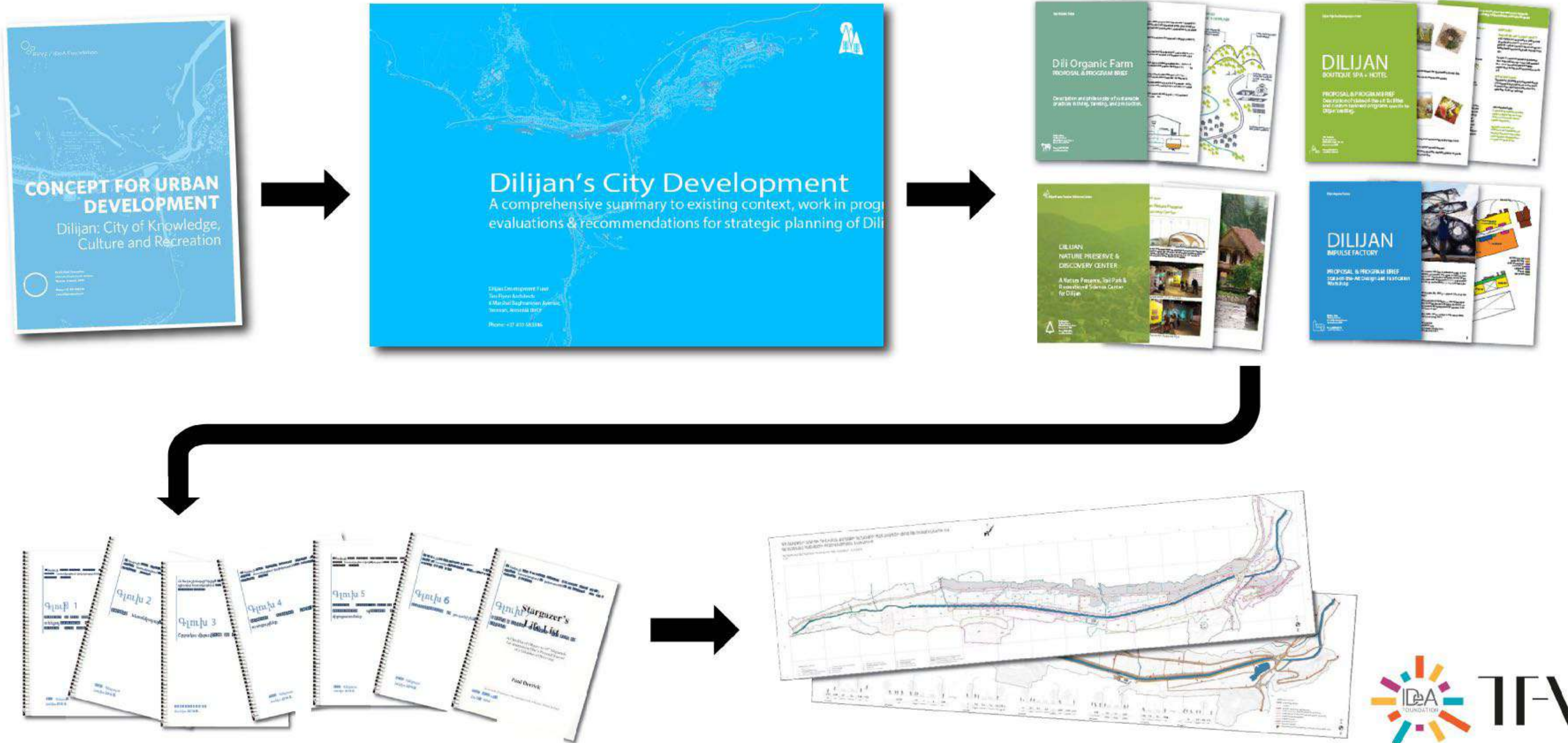
Historical District of Papanino



Infrastructure and urban environment betterment recommendations

As the ecosystem evolves, Dilijan will require infrastructure that supports both day-to-day tourism and long-term wellness investments. This includes:

URBAN



Our research showed that extensive work has been facilitated by IDeA Foundation, providing a valuable reference for future infrastructure improvements. Key areas include:

- Road network enhancements
- Zoning regulations
- Land use planning
- Development strategies
- Historic preservation initiatives
- Economic development programs

These resources remain relevant and should continue to be utilized as reliable references.

URBAN: Critical Infrastructure

STRATEGIC PLANNING FOR SUSTAINED GROWTH

Infrastructure development is essential for sustained population and tourism growth.

Prioritize transportation and utilities.

Plan long-term for smarter, sustainable urban environments.

WHY INFRASTRUCTURE MATTERS

Growing tourism and population drive the need for infrastructure upgrades.

- Transportation Networks
- Accessibility & Mobility
- Utility Expansion
- Urban Furnishings, Lighting, Wayfinding
- Street Trees Planting

URBAN: Ground Zero of Infrastructure

SUPPORTING GROWTH AT SCALE & EXPANDING ESSENTIAL UTILITIES

Water and Sewer

- Expand treatment facilities and sewer systems.

Electricity and Gas

- Modernize the grid and integrate renewable energy.

Telecommunication

- Broadband expansion for connectivity and competitiveness.

Coordination for Utility and Road Alignment

- Coordinating Utilities and Roadwork

Develop Integrated Infrastructure Plans.

- Synchronize utility upgrades with road paving schedules.
Implement "No-Cut" policies for newly paved roads.

URBAN: Transit & Mobility Improvements

TRANSIT EXPANSION AND ROAD MODERNIZATION

Road Network Improvements

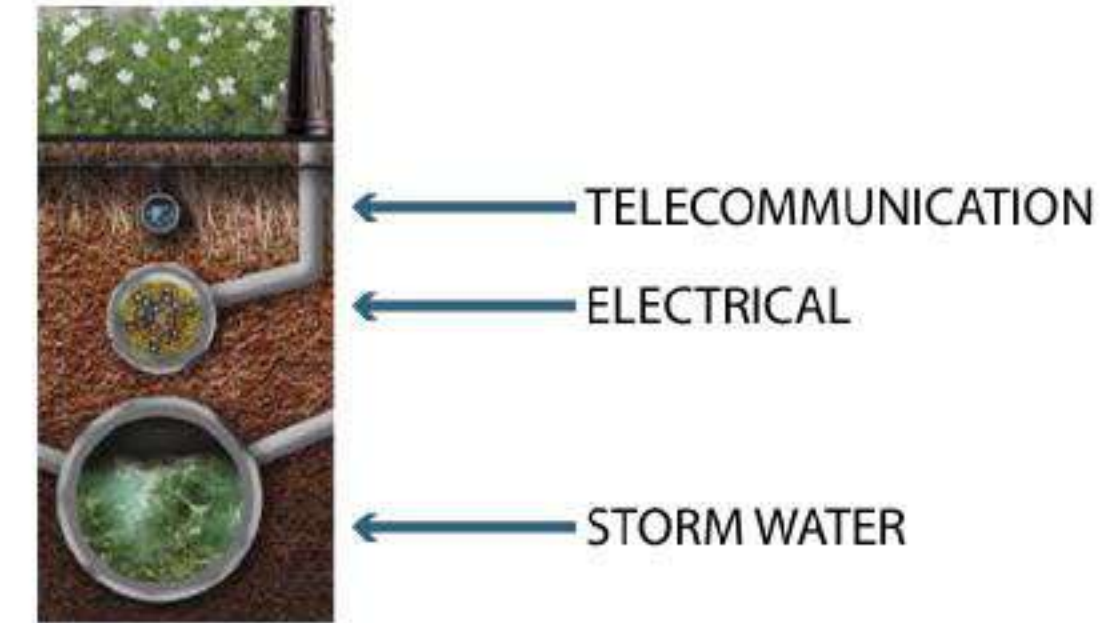
- Widen key corridors and enhance intersections.
- Implement smart traffic systems.
- Accessibility and Convenience
- Pedestrian-friendly spaces, bike lanes, and ADA compliance.

Transit Improvements

- Extend transit routes to underserved areas.
- Reliable and frequent services for residents and tourists.

URBAN: Utilities

**UTILITIES &
INFRASTRUCTURE
DEMAND &
CAPACITY NEEDS TO
BE ACCESSED**



**CAN DILIJAN BECOME 'ELECTRIC' & BE THE
MOST SUSTAINABLE CITY IN ARMENIA?**

URBAN: Creating a City Center



PARKS & OPEN SPACE



**COHESIVE URBAN
FURNISHINGS & PAVING**



**PEDESTRIAN TRAILS THAT WORK WITH
ELEVATION CHANGES**



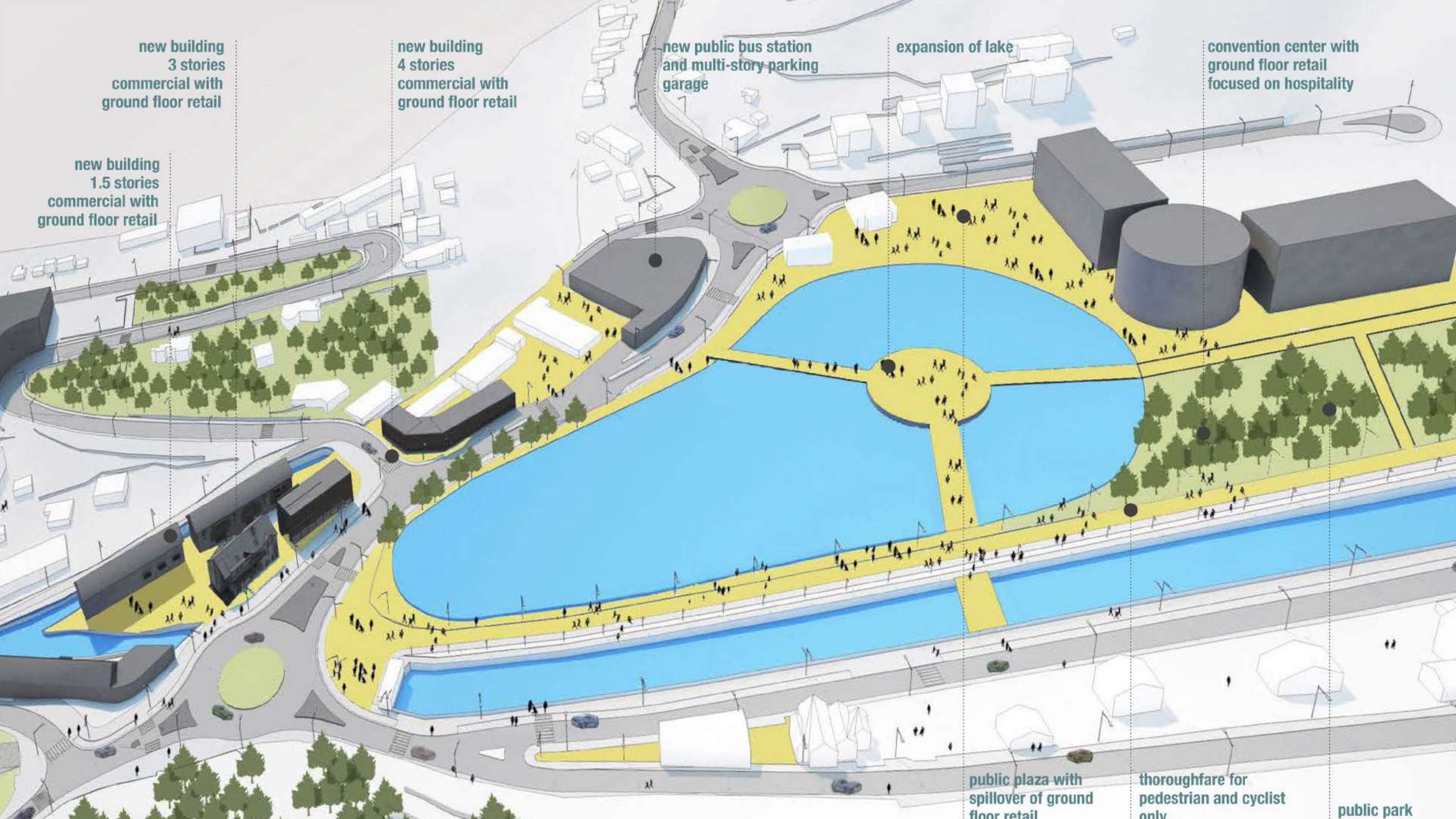
BIKE TRAILS



**VEHICULAR NETWORK
IMPROVEMENTS**



**LAND USE & ZONING
REGULATIONS**



new building
3 stories
commercial with
ground floor retail

new building
4 stories
commercial with
ground floor retail

new public bus station
and multi-story parking
garage

expansion of lake

convention center with
ground floor retail
focused on hospitality

new building
1.5 stories
commercial with
ground floor retail

public plaza with
spillover of ground
floor retail

thoroughfare for
pedestrian and cyclist
only

public park

URBAN: Establishing a Sense of Arrival



URBAN: Historic Preservation

IMAGINE WHAT
IT COULD BE!



URBAN: **Historic Preservation**



URBAN: Historic Preservation

IMPROVING THE
HISTORIC FABRIC &
INTEGRITY OF DILIJAN

PRESERVING THE
BEAUTIFUL
ARCHITECTURE

CONTRIBUTING TO
PLACE BUILDING

LEARNING FROM OUR
NEIGHBORS IN
GEORGIA

LEARNING FROM
KAKHETI

**\$75 MIL USD
IMPROVED**

TOURISM
CITY RENOVATION
CULTURAL HERITAGE
CONSERVATION OF PUBLIC
BUILDINGS



CREATED JOBS



IMPROVED
INFRASTRUCTURE



CREATED A FAVORABLE CLIMATE
FOR INVESTMENT



URBAN: Historic Guidelines



Figure 7.33.3 The house on the left includes acceptable level of fencing, with a balance between height and privacy, while the fencing on the right is not acceptable.

7.33.2.4 Steps

- Maintain historic hillside steps that may be an integral part of the landscape.

7.33.2.5 Landscaping & Site Grading

- Maintain landscape features that contribute to the character of the site.
- Incorporate landscape treatments for driveways, walkways, paths, building and accessory structures in a comprehensive, complementary and integrated design.
- The historic character of the site should not be significantly altered by substantially changing the proportion of built or paved area to open space.
- Provide a detailed landscape plan, particularly for the front yard, that respects the manner and materials used traditionally in the districts.
- Provide landscaped separations between parking areas, drives, service areas, and public use areas including walkways, plazas, and vehicular access points.
- Maintain original grading of the site when and where feasible.



Figure 7.33.4 Combining historic roof tiles with other materials is not permitted.

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7.33.5.5 Massing, Scale, & Height

- The size of a new building, its mass in relation to open spaces, should be visually compatible with the surrounding historic buildings.
- For additional requirements refer to the Zoning Section of the "City of Dilijan: Changes to the Master Plan and Zoning of the Gegharyan District."
- When overall length of a new structure is greater than those seen historically, it should employ methods—changes in wall plane, roof heights, etc.—to diminish the visual impact of the overall building mass, form and scale.
- Larger scaled projects should include variations in roof height in order to break up the form, mass and scale of the overall structure.
- Taller portions of buildings should be constructed so as to minimize obstruction of sunlight to adjacent yards and rooms.
- New buildings should not be significantly taller or shorter than surrounding historic buildings.
- Windows, balconies and decks should be located in order to respect the existing conditions of neighboring properties.



Figure 7.33.13 Height of new construction should be consistent with surrounding historical buildings.

- Regardless of lot frontage, the primary façade should be compatible with the width of surrounding historic buildings. The greater width of the structure should be set back significantly from the plane of the primary façade.
- Buildings constructed on lots greater than 8 meters wide should be designed so that the facades visible from the primary public right-of-way reinforce the rhythm along the street in terms of traditional building width, building depth, and patterns within the façade.

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7.33.5.9 Materials

- Materials should be compatible in scale, proportion, texture, finish and color to those used on historic buildings in the neighborhood.
- Materials—especially stone, masonry, whitewash, and wood—should be used in the manner they were used historically.
- Synthetic materials such as fiber cement or plastic-wood composite siding, shingles, and trim should not be used unless 1) the materials are made of a minimum of 50% recycled and/or reclaimed materials and 2) the applicant can demonstrate that use of the materials will not diminish the historic character of the neighborhood.

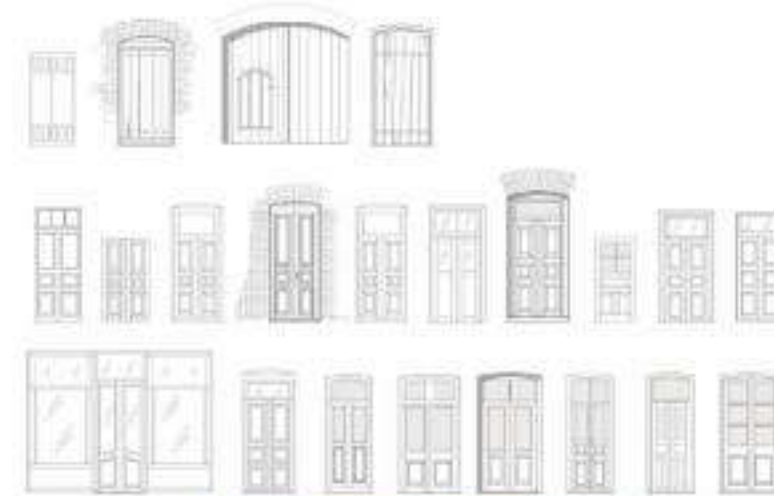


Figure 7.33.16 Acceptable and non-acceptable door designs.

7.33.5.10 Windows and Doors

- Stay consistent with the typical arrangement and rhythm of windows and doors in neighboring historic buildings.
- The ratio between window to wall space should be considered. For example, houses largely covered with windows or glass is generally not appropriate for historic neighborhoods.
- Windows and doors should be proportional to the scale and style of the building and be compatible with the historical buildings in the neighborhood.
- No PVC or Aluminum windows allowed on facades of historic building that face the street, or that may be visible from the street on the side of a building.



Figure 7.33.17 All glass windows and doors with modern designs are not an acceptable option.

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7.33.5.12 Decorative Elements

- Decorative elements, such as bargeboards, should be limited to the styles historically used in the neighborhood. See Figure 7.33.21 for types of bargeboards used.
- Overly ornate decorative elements are discouraged.
- Type A asymmetrical three-pitched home styles should be restrained in the amount of decorative elements it has.
- Baluster designs should be similar to designs historically used in Dilijan.

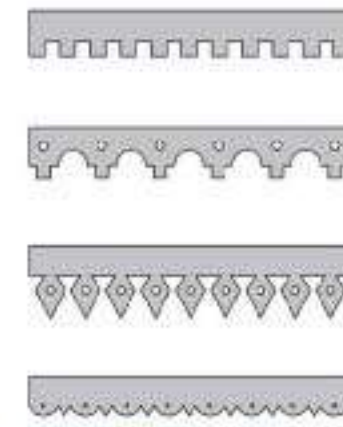


Figure 7.33.21 Decorative bargeboard designs historically used along the edge of roofs in stone buildings in various neighborhoods of Dilijan.

7.33.5.13 Paint & Color

- Exterior surfaces that are painted should have an opaque rather than transparent finish.
- Provide a weather-protective finish to wood surfaces that were not historically painted.
- When possible, low-VOC (volatile organic compound) paints and finishes should be used.

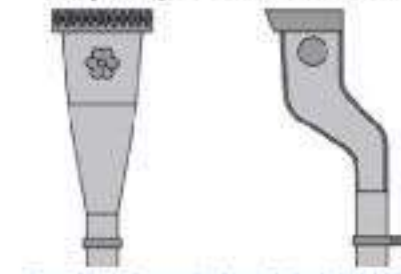


Figure 7.33.22 Baluster design types historically used in Dilijan.

7.33.5.14 Mechanical and Utility Systems and Service Equipment

- Equipment should not be located on the roof or primary façade. If equipment is located on a secondary façade it should be placed behind the midpoint or in a location that is not visible from the primary public right-of-way. For additional requirements refer to the Screening of Utility Structures of the "City of Dilijan: Changes to the Master Plan and Zoning of the Gegharyan District."
- Ground-level equipment should be screened using landscape elements such as fences, low stone walls, or perennial plant materials.
- Landing decks should be located and designed in order to minimize their visual impact.

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URBAN: Degrading Historic Context

Original shutter
removed

Façade replaced

Architectural details removed

Original windows replaced

Original roof replaced



LEARNING FROM

KAKHETI





Existing



Proposed



URBAN: Park

**CREATE MODERN PUBLIC SPACES
FOR LOCALS & TOURISTS**



Proposed Pedestrian Path along the Park

URBAN: Park



URBAN: Park



URBAN: Lake



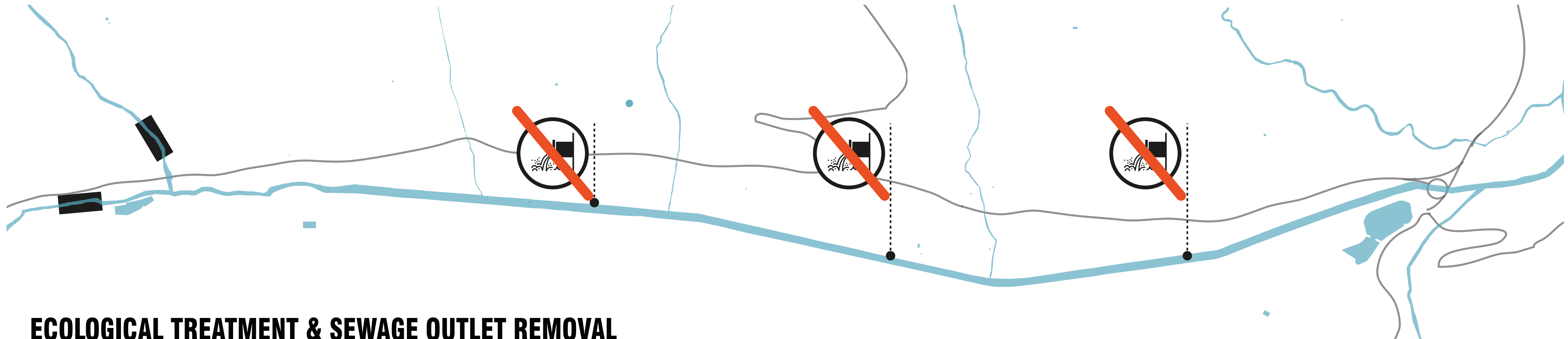
Existing Conditions

URBAN: Natural Lake



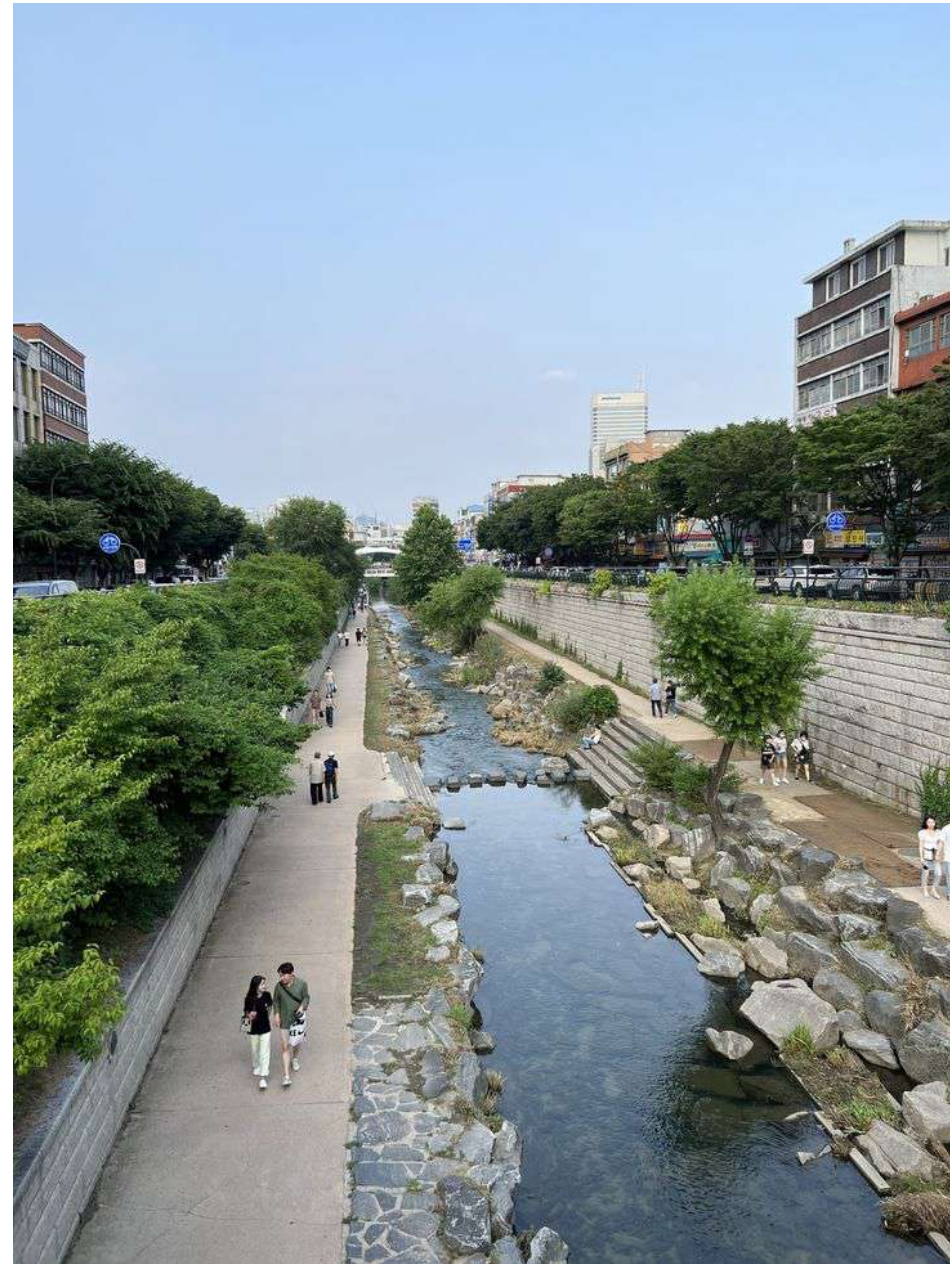
Proposed Environment

URBAN: Aghstev River



ECOLOGICAL TREATMENT & SEWAGE OUTLET REMOVAL

URBAN: Aghstev River



URBAN: Aghstev River



STEPS

Steps to allow access to the water.

New bridges to allow more convenient access and crossing of the river.

SEWAGE

Remove all sewage outlets from the river vicinity.

BOULDERS

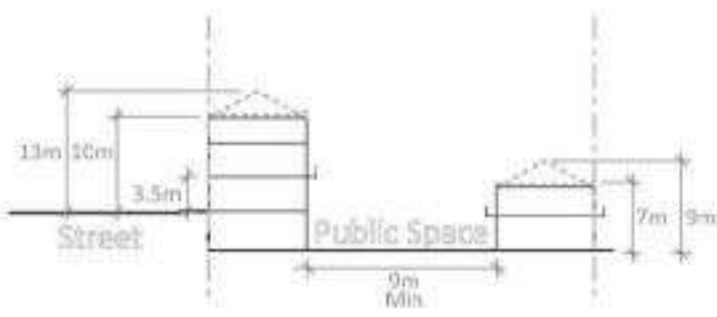
New boulders to create a rushing river sound even when the water level is low.

VEGETATION

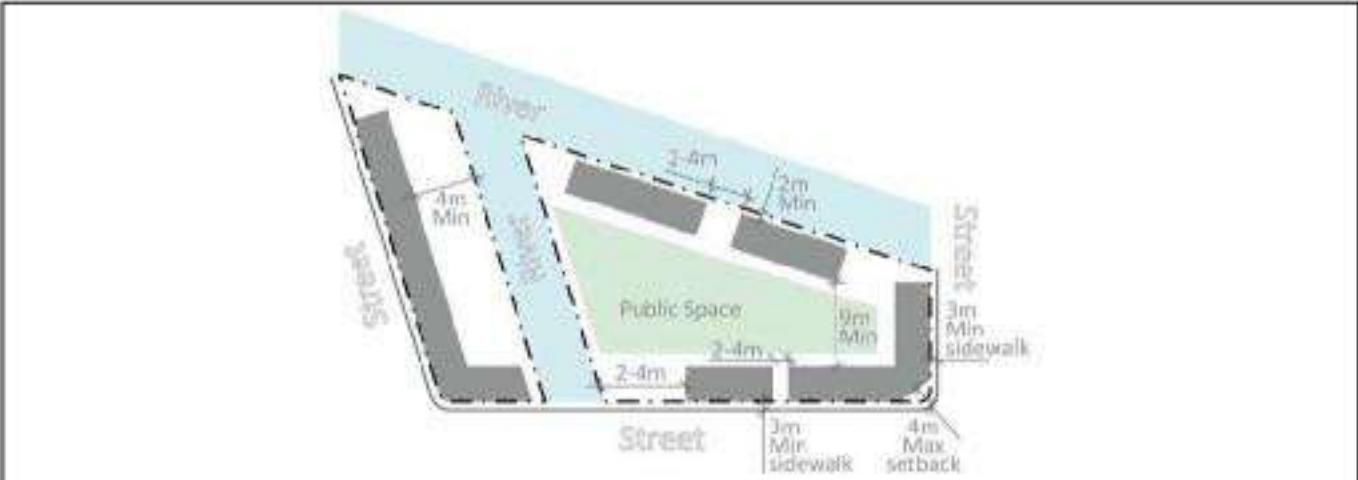
Vegetation that filters and cleans the river.

P1 Public District C14

1. Commercial Development		3. Building Disposition	
Lodging	Restricted use	Front yard	Not Permitted
Residential	Restricted use	Side yard	Conditional
Office	Permitted	Rear yard	Conditional
Ground Floor Retail	Required	Courtyard	Permitted
2. Building Configuration		4. Lot Occupation	
Principal Building	(3) storey Max. + Attic	Lot Width	Varies
Secondary Building	(2) storey Max.	Lot Coverage	(70%) Max

5. Building Configuration	
Building height shall be measured in number of stories, from the highest street level elevation point, including Attics and raised basements.	
Stories may not exceed (10) meters with flat roof and (13) meters with sloped roof. First floor height must be a minimum of (3.5) meter high from finished floor to finished ceiling.	
Building at rear of the lot are limited to (9) meter in height with sloped roof and (7) m with flat roof.	
Height shall be measured to the top of parapet or roof ridge whichever is tallest.	

6. Principal Building		7. Secondary Building	
Front Setback	(2) m Max when facing street	Setback from Principal	(9) m Min.
Rear Setback	(2) m Min when facing street, (4) m Max at corner of building	Rear Setback	(2) m Min
Side Setback parallel to River	(2.0) m Min. - (4) m Max.	Side Setback parallel to River	(2.5) m Min.
- The Facades and Elevations of Principal Buildings are encouraged to be flush with the lot lines along major thoroughfares, unless additional space is needed to accommodate for public sidewalk. - Facades shall be built along the Principal Frontage. - A (3) m sidewalk shall be maintained at all street frontage		- The Elevations of the Secondary Building shall be distanced from the Lot lines as shown. - Secondary Building should showcase how they will not block daylight access or view to the principal building.	



8. Private Frontages		9. Parking Placement	
Common Lawn	Conditional	No onsite parking is required. Parking shall be provided within 200 meters of the property.	
Porch & Fence	Not Permitted	10. Trash Receptacles	
Balcony	Permitted	Trash containers shall be stored within a designated area of the building and shall only be removed on to street during trash collection hours.	
Stoop	Conditional		
Shopfront & Awning	Required		
Gallery	Permitted		
Arcade	Permitted		

11. Additional Requirements	
- Building Function (See Table 7.5.1) Ground floor: Food and beverage, Real Estate Sales Office, Retail Banking, Information Center, Clothing, Art Gallery, & Mobile Store. Offices: Finance, IT, Engineering & Construction, Media & Film, Live/Work Units, Art Gallery - Must have at least 40% as open space for public use. The open space should be at least 9 meters wide. - Architectural character should serve as a linkage between the two historic conservation zones, Papanino and Old DiliJan.	

7.11. Common Use Transportation Zone

CU 4 Common Use Zone D13

1. Parking Deck or Parking Surface		3. Building Disposition	
Lodging	Not Permitted	Front yard	Not Permitted
Residential	Not Permitted	Side yard	Regulated Use
Office	Permitted	Rear yard	Permitted
Ground Floor Retail	Permitted	Courtyard	Not Permitted
2. Building Configuration		4. Lot Occupation	
Principal Building	No Limit	Lot Width	Varies
Outbuilding	No Limit	Lot Coverage	Varies

5. Building Configuration	
Common Use Zone can be overlaid in the following Districts:	
- Residential, except in R4, R5, R7 and R8 zones - Public Districts, except in P1; P2; P5; P6; - Public Green, except in PG1; PG3; PG4; PG6; PG7;	
The maximum allowed height for parking garages is 16 meters.	
Parking garages should provide green walls at all facades above the ground floor commercial spaces. (See Figure 3.14)	



Figure 3.14: Green walls at parking garage above ground floor commercial spaces.

6. Principal Building	
Front Setback	Front Setback Principal
Rear Setback	Front Setback Secondary
Side Setback	Side Setback
Any development surrounding these properties must maintain a minimum of 5 meter setback and may not block the main view of the monuments. Visual studies must prove that the visibility of the site remain as is from various distances and angles.	

7.8.8. Multi-Story Building Additions and Accessory Buildings

Additions or restoration to multistory buildings shall be done in unison with the building, using the same materials, style, and typology. (See Figure 7.8.3 & 7.8.4) Consider using the same typology, for window replacement, balcony extensions, and materials used. Buildings that are greater than (6) stories are considered high-rise; (6) stories to (3) stories are considered mi-rise; anything that is (2) stories or less are considered low-rise.



Figure 7.8.3: Balcony Additions done in unison to entire building



Figure 7.8.4: Balcony detailing done in unison to entire building

Additional low-rise commercial developments adjacent to or in front of existing multi-story buildings shall be built in continuous linear bars, sharing similar architectural style, scale, proportions, window and door sizes and typology. Isolated construction are not allowed. (See Figures 7.8.5 & 7.8.6).



Figure 7.8.5: Isolated Additions in front of existing mid-rise or high-rise residential, not allowed.

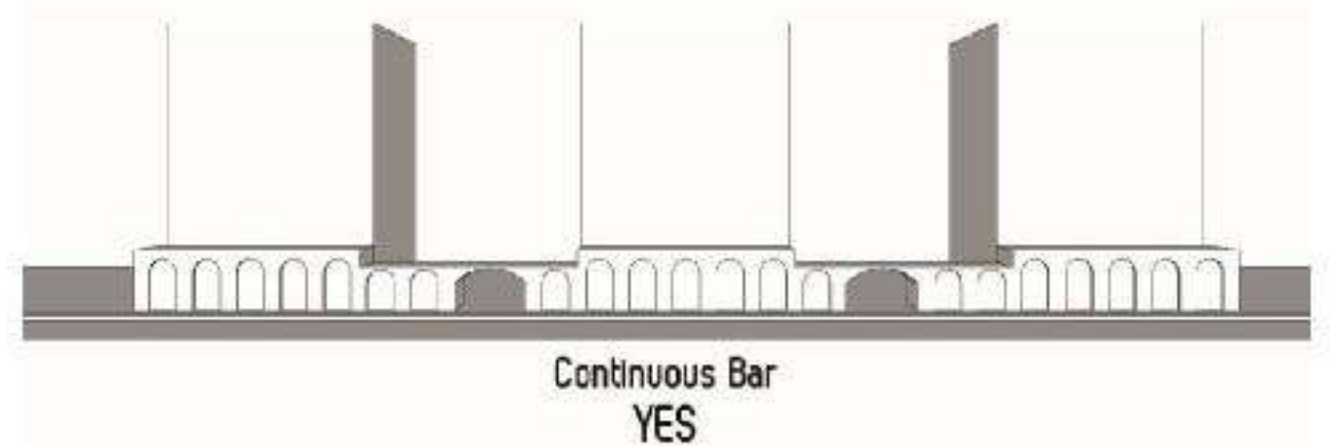


Figure 7.8.6: Continuous strip of commercial activity that is integrated together with the existing mid-rise or high-rise residential, is allowed.

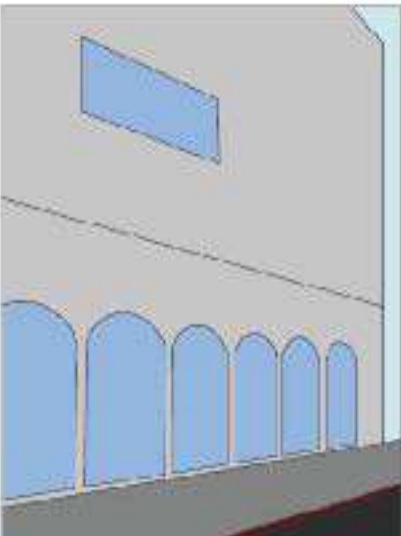
7.12. Building Design Standards

7.12.1. Architecture

Aesthetically new buildings in general are either encouraged to follow the proportion, scale, color, finishes, and materials of what is considered to be heritage architecture of Dilijan. Likewise new buildings that are "modern" in essence should reflect the scale, proportions, materials and finishes of the historic Dilijan. The following design standards are intended to provide for the architectural interest of buildings throughout the City:

1. The first floor façade of all buildings, including structured parking facilities, shall be designed to encourage and complement pedestrian-scale interest and activity through the use of elements such as windows, awnings, and other similar features.
2. Architectural features and treatments shall not be limited to a single façade. All visible sides of a building, whether viewed from public or private property, shall display a similar level of quality and architectural interest, with elements such as windows, awnings, a variety of exterior materials, reveals, and other similar features.
3. All buildings shall be designed to have at least two of the following (See Figure 7.12.1):
 - a. Visual breaks in the façade such as horizontal articulation in the plane of the façade; or
 - b. Change in height of the façade if roof is not sloped;
 - c. Change in materials, color, texture or pattern;
 - d. Columns or pilasters with a minimum (10) centimeter horizontal depth from the plane of the façade and spaced at a maximum interval of (15) meter.

Buildings must provide visual interest using facade articulation, breaks, columns height changes or changes in color, texture or pattern



Not Acceptable



Acceptable

Figure 7.12.1: Façade Design

or buried PVC or metal pipelines. The trench cover should not be raised or proud of the sidewalk, but shall remain flush with the sidewalk finish.

The trench drain shall remove the water from the building onto a street or onto a landscaped zone.



Figure 7.12.4: Trench Drain represented above are not allowed.



Figure 7.12.5: Trench Drain represented above are allowed.

Cisterns can be used to capture and store large amounts of runoff. Cisterns can be slowly emptied through gravity flow, or by pumping the water out. The water from the cistern can be used for irrigation. Cisterns also need to be emptied before each rainfall. When emptying a cistern, the runoff must be directed away from adjacent homes to a safe outfall. A design of the cistern must be submitted for review. A separate building permit is required for the construction of cistern.

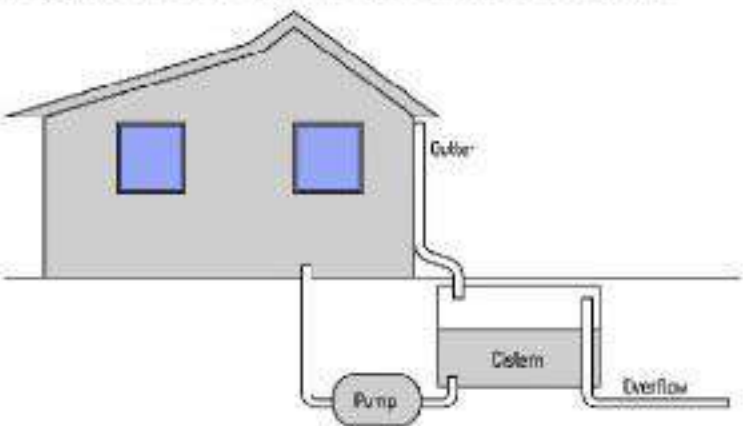


Figure 7.12.6: Cistern

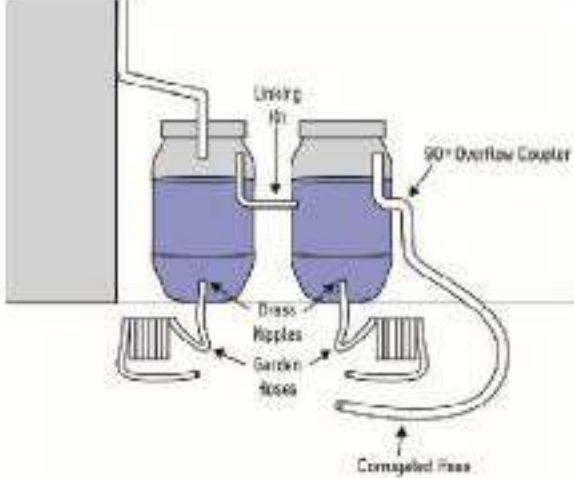


Figure 7.12.7: Rain Barrel



Existing

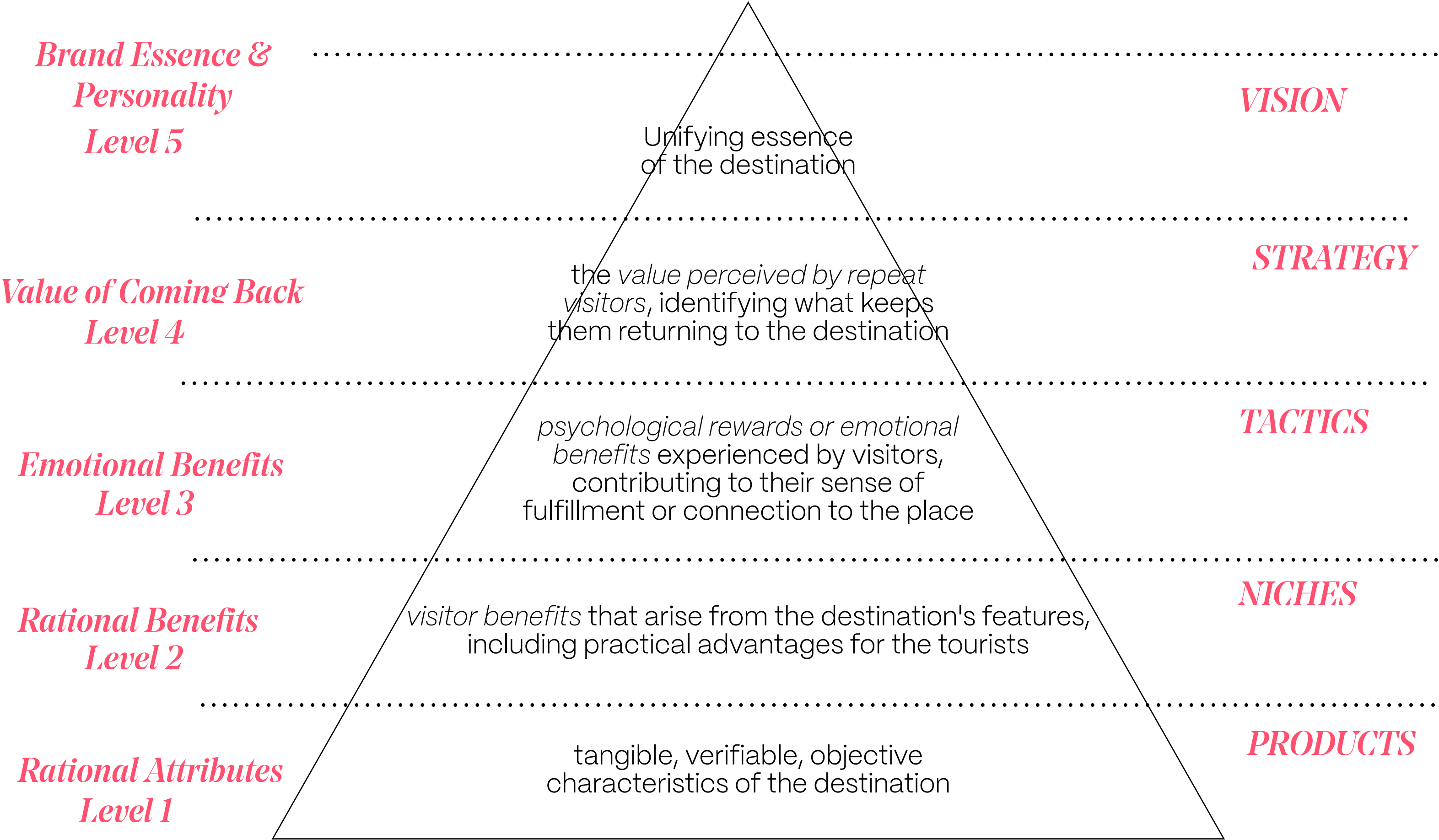


Proposed

CHAPTER: #3

DESTINATION BRAND PYRAMID

DESTINATION BRAND PYRAMID FRAMEWORK



DESTINATION BRAND PYRAMID
DILIJAN

BRAND ESSENCE

BRAND PERSONALITY

VALUE OF COMING BACK

EMOTIONAL BENEFITS

RATIONAL BENEFITS

RATIONAL
ATTRIBUTES

By embracing a slower pace, you open yourself to deeper experiences and inspiration, ultimately leading to a sense of wholeness and overall well-being.

.....

Grand and Timeless, yet Soulful Host

.....

Seasonal Variety: New Season, New Dilijan
Sense of Purpose: Return to old-world values, comfort of familiarity
Never-ending pursuit of Wellness: mental, emotional, and physical renewal
Destination Facilities /future forward/: events, hotels, gastronomy

.....

A palette of emotions from deep rest to cultural immersion

Awe & Inspiration | Mindfulness & Inner Peace | Sense of Timelessness | Sense of Purpose and Renewal | Nostalgia and Simplicity (return to a simpler way of life) | Wander, exploration, connection | Adventure & Excitement | Cultural Immersion

.....

Relaxed and Energized | Renewed Sense of Vitality | Feel at Ease | Laid-Back Lifestyle | Embrace Slowness and Escape form urbanization | Unspoiled Natural Beauty | Savor local produce and gastronomic delights | Unique blend of Nature and City | Sense of Discovery (hidden gems in nature and culture | Cultural Immersion and Authenticity | Adventurous Spirit (exploring trails, forests, and wildlife) | (re)Connection with Heritage and Tradition

.....

Dilijan National Park | Clean Mountain Air and Mild Climate | Water Resources | Scenic Routes | 19th-Century Wooden Houses | Haghartsin and Goshavank | Dilijan Art Gallery | Hiking and Gastronomy | Various scale accomodation opportunities

CREATIVE TOOLKIT

VISION

**Slow Wellness
is a Quite Luxury**

Note: Invites visitors to be inspired by a deeper connection—be it nature, culture, or self-reflection.

STRATEGY

**Experience of
Wholeness & Wellbeing**

Note: Multi-tiered development approach to destination building

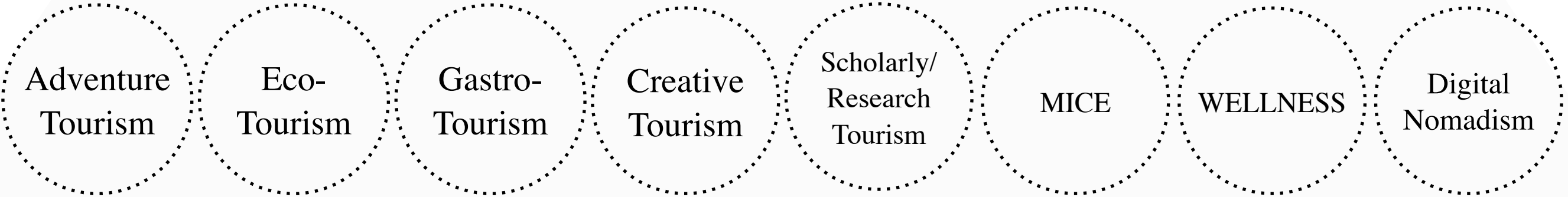
**Hybrid Ecosystem of General
and Practical Wellness**

TACTICS

**3-color experience palette
Inspiration as 21st century asset
Introduce New urban/cultural icons (except Corn)**

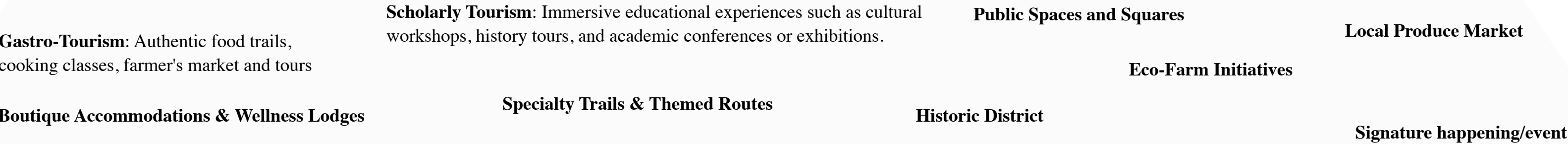
Note: 3-Color Experience represents a symbolic and aesthetic differentiation of the destination. Each color represents an emotional or sensory state: green for tranquility (nature), blue for exploration (adventure, water), red for passion (hospitality). This allows visitors to connect with the place on an emotional level, guided by unique, color-themed experiences.

NICHES



PRODUCTS

Examples



DESTINATION TAGLINE SUGGESTIONS

VERSION #1

DILIJAN

Naturally Inspiring

TAGLINE GAMIFICATION

DILIJAN
Naturally
Delicious

TAGLINE GAMIFICATION

DILIJAN
Naturally
Relaxing

TAGLINE GAMIFICATION

DILIJAN
Naturally
Well

TAGLINE GAMIFICATION

COME TO DILIJAN
this is amazing!

this is amazing!

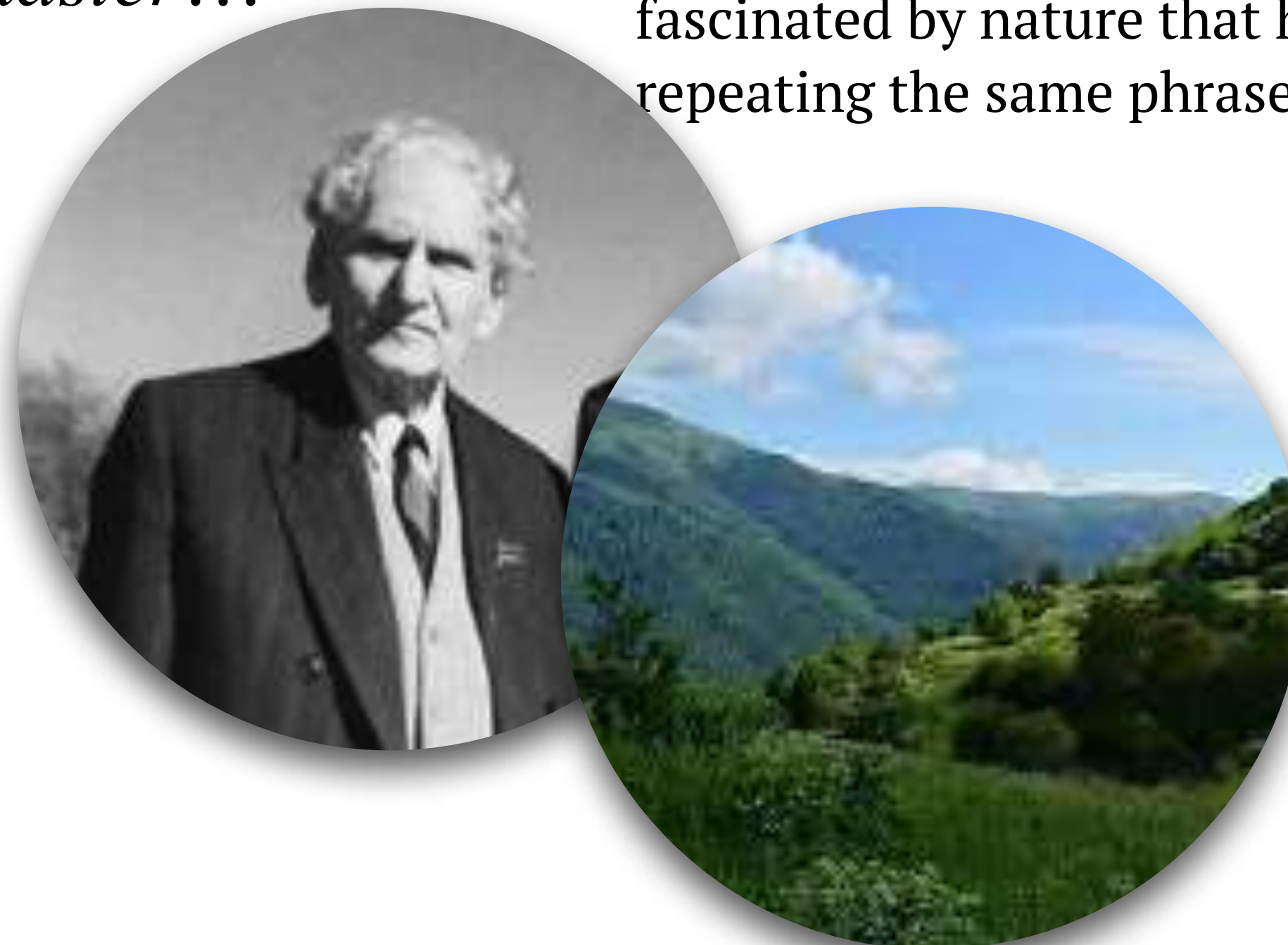
And how not to agree with the master...

Legendary back story to let the master speak for the place

Yelena Mirzoyan, wife of Edvard Mirzoyan recalls:

“Every morning he (Saryan) used to stand on his balcony and say ‘This is amazing!’

Once, the cleaner came and told us that Saryan had lost his mind. He kept repeating the same phrase every day. But of course that was not the case; he was so fascinated by nature that he kept repeating the same phrase every single day”.



VERSION #3

#Well_in_Dilijan

VERSION #3

Well*is*Dilijan

#Well_in _Dilijan

- short, memorable, and evoke a specific feeling or promise about the experience
 - could tap into the growing global trend of wellness tourism and play on the destination's natural beauty, offering a holistic, inspiring environment for rejuvenation
- future forward and scalable as Dilijan expands its infrastructure, emphasizing both the spiritual rejuvenation already associated with the area and future development toward specialized wellness and spa treatments.
- has excellent potential as both a hashtag and a catchphrase. It can seamlessly integrate into social media campaigns, casual conversations, and even merchandise. The hashtag could capture experiences ranging from nature retreats to cultural immersions, building a community around the wellness theme.

DILIJAN CLUSTER BRAND ANCHOR LINES:

WHOLENESS AND WELLNESS

Dilijan's vision builds on the connection between inspiration and wellness as a key draw for travelers seeking a holistic getaway.

In an age where inspiration fuels creativity and mental health, Dilijan's landscapes and tranquil spaces foster mindfulness and renewal, making it a haven for those seeking balance.

Eventually, the perception of wellness is more than physical; it's emotional and creative. Visitors find inspiration in nature, experiencing the synergy between mindfulness, inner peace, and creativity.

In a long run, this is the untapped potential for future developments in wellness category.

SLOW TRAVEL

Dilijan embodies slow travel, encouraging visitors to pause, reflect, and engage deeply with their surroundings. It's not just a place to visit, but a space to live in the moment—unplugging from the rush of daily life to experience the simplicity and beauty of life at a slower, more meaningful pace.

HERITAGE OF CULTURE & NATURE

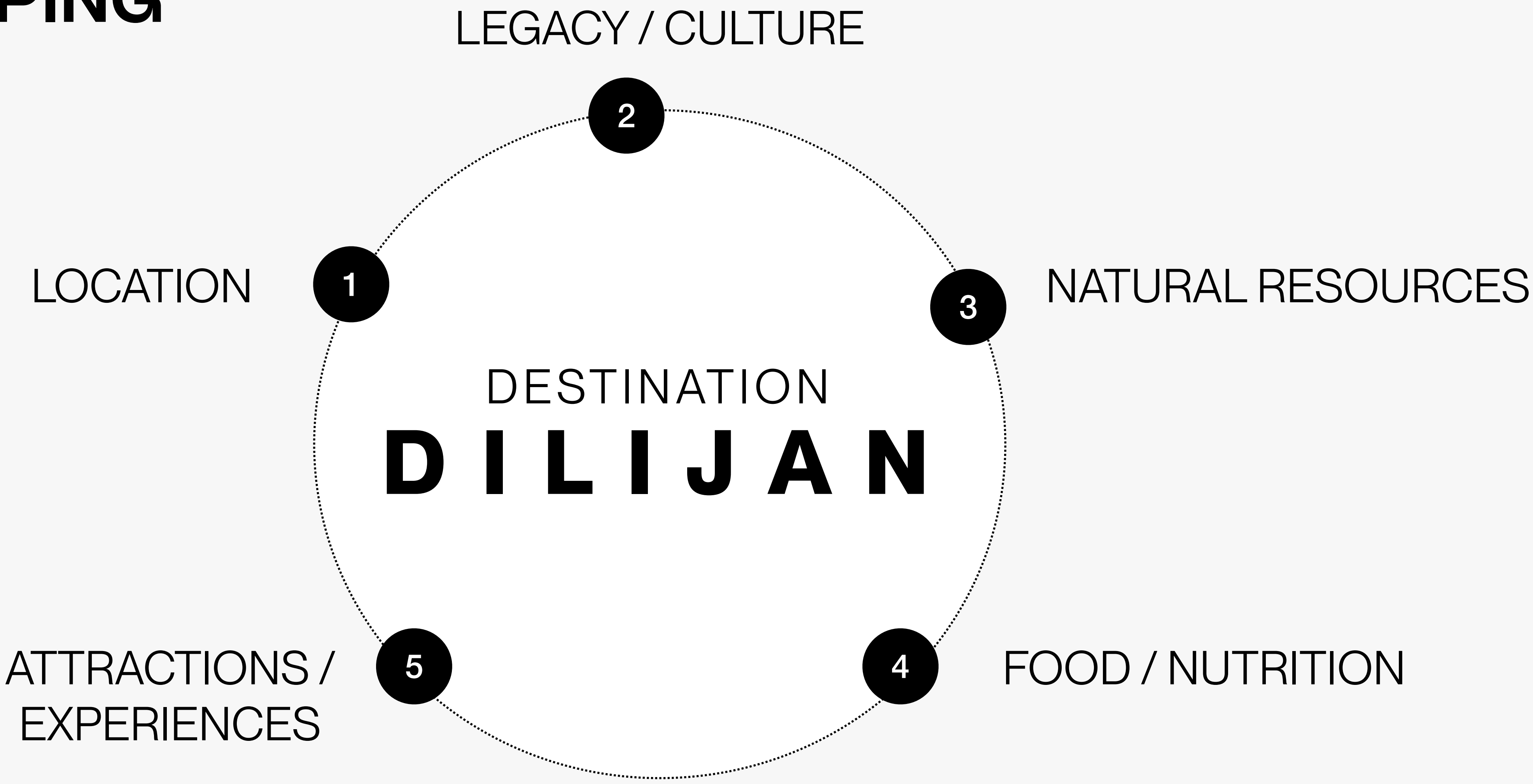
Dilijan's rich heritage—both cultural and natural—offers visitors a deeper understanding of place. The town invites them to engage with its history, Soviet-era charm, and unspoiled nature. This unique blend of heritage and environment serves as a continual source of inspiration for those who seek meaning in tradition and authenticity.

APPENDIX #1

DILIJAN: ASSET MAPPING



ASSET MAPPING



STRATEGIC LOCATION REGIONALLY, MODERATE ACCESSIBILITY AND GOOD LEVEL OF ISOLATION

- ✓ Important transport hub at the intersection of roads connecting Armenia and Georgia, Lori and Tavush regions
- ✓ Important nod in the regular tourist route around Armenia
- ✓ Total population of the community is 26,700 people, with gender balanced (53% female), predominantly urban (30% rural) population.
- ✓ The total area of the lands included in the administrative boundaries of the community is 63,317 hectares, of which **over 50% are the forest lands of the Dilijan National Park.**
- ✓ The city status was acquired in 1951, occupies the surface of 43km. It is located at 1250-1500m a.s.l. City area is covered with deep woody canyons, steep rocks and forests. Due to the geographical position of the region, the irregularity of the relief, different locations of slopes, interaction of floristic regions it is known for its rich landscape- and bio-diversity.
- ✓ Accessible only by road transport (no airport, no functioning railroad)
- ✓ The key drivers of the economic growth are tourism and agriculture/forestry.



Image: Location of Dilijan & proximity to other major locations

RESORT TOWN WITH DECADES LONG LEGACY

- ✓ Between the late 19th and the early 20th century Dilijan attracted the wealthy and aristocrats from the largest cities of Transcaucasia and was considered a place of summer residence.
- ✓ Surrounded by the Dilijan National Park, Dilijan reached its zenith during the Soviet era as a health resort, a regular vacation destination for various artists, mainly due to Composers' Union Resort and home to many Armenian artists, composers and filmmakers.
- ✓ Reputed to be one of the most attractive towns in Armenia - often referred to as "Little Switzerland" by virtue of its natural setting and distinctive 'alpine' architectural vocabulary.
- ✓ The nature, mountainous landscape, forests and fresh air in the Dilijan area create a perceived atmosphere of a resort. Resort and passive tourism in Dilijan community has always been attractive for locals as well as for international tourists.
- ✓ During Soviet period, Dilijan transformed from small habitat into a city with a dynamic industrial (ex., Impulse Factory) and cultural vibe (ex., Composer's Union), meanwhile during post Soviet era wellness component was totally forced out, touristic vision for Dilijan was lost.



CITY WITH HISTORICAL URBAN IDENTITY

✓ Dilijan has a recognizable architectural appeal - an immense valuable asset in building a recognizable destination.

✓ It is one of few locations in Armenia that had and partially has a historic architectural style. Firstly originating from various influences of Armenian, Georgian, and Molokan styles, urban texture was later enriched with Soviet modernistic buildings.

✓ Due to the absence of centralized preservation policy, the historic integrity of the city has been compromised - through lack of maintenance old buildings have been modified losing their historic value, some are even demolished or replicated with modern building of various interpretations of the old style. This is an effort by modern developers to infuse the old charm of the city into their new establishments.

✓ One of few (if not unique) urban preservation cases in the city continues to be Sharambeyan street, known as Old Dilijan, that is in the territory of Tufenkian Heritage Hotels.

Source: Urban Analysis fro Dilijan City Park Project

High-Rise Papanino



Historical District of Papanino



A RESORT NEIGHBOURHOOD WITH UNIQUE HISTORICAL ATTRACTIONS

- ✓ Cultural heritage assets automatically place this direction capable of meeting a wide array of touristic aspirations to explore Armenia as an ancient historic land.
- ✓ Cultural aspirations paired with urban experiences and established gastronomic facilities creates a multi-faceted offering of Dilijan and adjacent area.
- ✓ 303 cultural/historical monuments (40% from medieval ages, 5 landmarks dating BC), among which several cultural heritage sites of national importance are located in a proximity from the City of Dilijan and can easily made part of the cultural route, while staying in City of Dilijan as the home base of the journey.



Haghartsin is a monastery complex dating back to the 10-13th century. It is located only 12 kilometers away from Dilijan City. The monastery is in very good condition and it is a popular tourist destination. Haghartsin is considered to be one of the greatest constructions and architectural values among ones which are similar.



Goshavank is located in Gosh village, which is 16 kilometers away from Dilijan city. The church had the best book depository among similar constructions. Dr Sheikh Sultan bin Mohammed Al Qasimi, an Arab Sheikh from UAE was so impressed by the uniqueness of Goshavank, he financed the renovation of the Monastery.



Jukhtak Vank is 3 kilometers west of Dilijan city. It was built in the 12-13th centuries and consists of two churches, from which it got its name “Jukhtak”, which is translated into “twins churches”.



Matosavank is a medieval church located in front of Jukhtak vank.

RICH ENDOWED ASSETS INSTRUMENTAL FOR RELAXATION, AS WELL AS ACTIVE EXPLORATION

- ✓ Dilijan National Park (33,765 ha) is a unique site of Armenia's wildlife, which stands out by the wealth of original biodiversity, mezophile woodlands, separate ecosystems of scientific, educational and economic interest.
- ✓ **Literally hugging the city, it provides a unique value and appeal to Dilijan to be “a city inside a national park” - a vast green “wild” surrounding.**
- ✓ Secondly, Dilijan National Park is also a great infrastructure for Adventure tourism and Ecotourism with 80km of Transcaucasian trail, 20+ hiking trails, camping grounds and Ropepark. The unique natural and historical destinations in Dilijan park are attractive for many individual tourists, hikers and travelers.
- ✓ National Park Area provides authentic possibilities for a variety of experiences, some of which are already the most important touristic offerings of the area: The wildlife and birdlife (ex. Birdwatching), Eco and Adventure activities like exploring the river and mountain areas are emerging.



PARTICULAR RICHNESS IN WATER RESOURCES, YET UNTAPED POTENTIAL FOR HYDRO TREATMENTS

- ✓ Dilijan is famously known for its curative mineral waters that have attracted visitors to its spas since the late 19th century.
- ✓ Today the waters are best known in the form of bottled mineral water produced by the Dilijan Water Company at the town's mineral springs. The "Dilijan" mineral water factory was established in 1947 and was one of the first and best known companies producing mineral water not only for Armenia, but also for the former USSR.



Parz Lake is located in Dilijan National Park, to the north of Dilijan City at the altitude of 1400 meters above sea level surrounded by forest. It is a lovely place for local tourists especially in summer time.



Gosh Lake is located in Tavush region, near Gosh village. The length of the lake is 100 m, width – 80 m. Approximate depth is 8 m. In the summer water temperature reaches up to 14 C. This is an earthly paradise, far from the bustle of the city, with charming monuments, rocks and mineral springs.

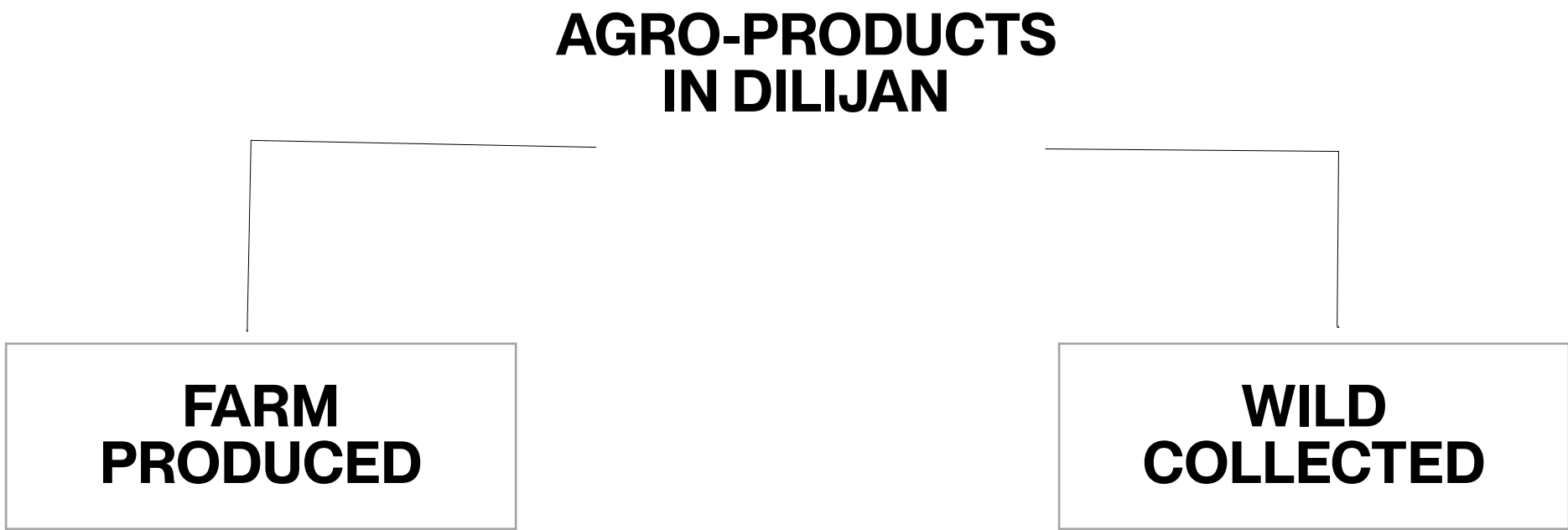


Spring Waters
Ttujur (in the Getik river valley), Margahovit (rich in iron), Fioletovo (rich in carbon and calcium) and Bldan springs (known under the brand name "Dilijan") are notable. These waters are rich in hydro-carbonates and are useful to treat gastrointestinal diseases.

DILIJAN – A CITY WITH ENDEMIC HERBS & GREENS

Local people have always relied on the “gifts of forests” as a crucial economic resource of the family wellbeing. Among them are herbs, greens, berries and mushrooms. These can contribute in maintaining a healthy diet and lead to specific gastronomic experimentations.

Agro products in Dilijan are divided into 2 groups, farm produced and wild collected. Wild collection is taking the bigger share in the agro products sector.



- The main farm produced agro products in Dilijan area are meat, diary, eggs, honey, etc.
- Producers are mainly individual farmers who supply their products to local groceries, hotels, and restaurants.
- The only known agro-processing company is Dili which is producing mozzarella cheese for export.

- Wild collected agro-products in Dilijan community are mainly mushrooms, greens (“sindrik”), herbs, wild fruits (nuts, pear and etc.).
- They are mainly collected from forests, and sold on roadsides, near their homes. A portion of collected products are supplied to hotels and restaurants.
- Wild collected agro-products do not undergo further processing and export. Additionally, there is no processing factory in the area.
- Non-timber forest products is always a secondary source for revenue because of high seasonality.

DILIJAN – A CITY WITH UNTAPPED GASTRONOMIC SYMBOLS

- ✓ Besides nutrition cycle, there is a completely untapped potential to make authentic food lots into territorial/regional symbols - gastronomic place makers, most central among them **Wild Oyster Mushrooms**.
- ✓ Surrounding area is rich in Endemic plants, including herbs, green, medical herbs, wild fruits, endemic spices. Another route of possible development and re-presentation concerns applying Dilijan endemic herbs and greens into intentionally designed signature SPA products: treatments, skincare products.
- ✓ **Homemade products – honey, lavash, vodka, etc.**
 - Farmers and agro producers sell homemade products near trails and roads during tourist season.
 - The common products are honey, lavash, vodka, corn and various organic products.
 - Fruits (oriental apple, English wallnaut, European hazel, Caucasian pear, cherry plum



Вкусы, запахи города: “гастрономический город”

Из кулинарного ассортимента можно указать присущие местной кухне (редко встречаются в других регионах):

- Грибы*
- Сали (печенье, которое готовится на Преображение и известно только в Тавуше, является ритуальным десертом на праздник Вардевар — Преображения)
- Назук (бисквит, который распространен в этом регионе и готовится по праздникам).



DILIJAN – A CITY FOR FAMILY AND FRIENDS GATHERINGS, BIG AND SMALL

- ✓ Visitors to Dilijan are mainly drawn by nature.
- ✓ There is an emerging interest in eco-, adventure tourism activities (Jeep Riding, hiking trails)
- ✓ Visitor flow mainly consists of families, friends, couples, individual hikers
- ✓ Passive or active leisure is coupled with gastronomy.
- ✓ Entertainment opportunities other than nature observation are limited within Dilijan (e.g. Verev Ropepark, Ditaran Immersive Dome).
- ✓ Shopping is limited to local souvenirs and produce, among which are Tufenkian Heritage Hotel Souvenir Shop, Local Lore Museum Souvenir shop.
- ✓ One of the areas for both international and domestic tourists to visit Dilijan is conferences, festivals and exhibitions, including
Traditional festivals – Diliton, Vardavar, Gastrofest,
Recurring events/festivals - Wine Fest, Financial/banking forums, Chess Championship, film/music festivals
Special purpose events once held - Summit of Minds, Dilijan Art Observatory, Aurora Prize

DILIJAN – A CITY FOR CRAFTSMANSHIP

- ✓ Dilijan’s authenticity is reflected not only in its architecture, but also the works of masters living there - craft makers and artisans.
- ✓ Dilijan **Museum of Folk Art and Dilijan Local Lore Museum and Art Gallery** are the centralized facility for a comprehensive exploration through the history of Tavush Region, especially Dilijan, the historical development of the local people, their way of life, material culture monuments, historical and geographical conditions.
- ✓ Art Gallery expands the viewers interest to explore more Armenian content, as it displays a great number of artworks created by Armenian, as well as foreign artists - Ayvazovski, Saryan, Surenyants, Minas, Terlemezyan, Bashinjaghyan and others.
- ✓ Central Bank’s Money Museum is yet another facility, which is open upon prior registration.



- Old Dilijan, part of the city has very unique architecture and every tourist tries to visit and walk along this street at least once, while visiting Dilijan.



- People in Dilijan have amazing carpet making skills, and their works are valued both by Armenians and international tourists.
- They have kept the cultural style of Dilijan and continue educate younger generations to those skills.



- Craft makers and Artisans are also famous in Dilijan. They have art schools and colleges where children are taught handmade crafting skills, doll making skills, and pottery.
- Many famous painters are from Dilijan, and they have their Art studio galleries in Dilijan.

Вышивка в
Дилижане

Из экспозиции
Музея народного
творчества в
Дилижане



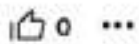
Мариам
Асламазян, 1950



Серик Давтян,
Картины
вышивкой



Gayane H
Yerevan, Armenia
39 contributions



It is better to call Art museum!

Sep 2017 • Couples

Still wondering why it is called geological museum, in any case this tiny museum has stunning art pieces which will transform your stay in Dilijan. In case you have time, don't skip it: colors and shapes will astonish you. Just visit, and you will not regret!

Written August 13, 2018



LIST OF ATTRACTIONS

- 1

Sharambeyan street
- 2

The city park and the artificial lake
- 3

The local Lore museum and art gallery of Dilijan
- 4

The city center and the Soviet heritage
- 5

Dilijan National park
- 6

Rotonda and the new amphiteatre
- 7

The monument dedicated to the 50th anniversary of the Soviet Armenia
- 8

Verev Rope park
- 9

Lake Parz and Gosh
- 10

The library named after Ghazaros Aghayan
- 11

”Drunken Forest”
- 12

Mount Dimats
- 13

The King od the forest
- 14

The monument of the movie “Mimino”
- 15

The monument of the soldiers of the Great Patriotic war
- 16

The Museum-workshop of Ashot Babayan
- 17

Matosavank
- 18

The sidestreets of Dilijan and the revival of traditions
- 19

"Armenia" in the likeness of the goddess Anahit
- 20

Aghavnavank monastery complex
- 21

Jukhtakvank monastery complex
- 22

Haghartsin monastery complex
- 23

Goshavank monastery complex
- 24

Matinov's fountain
- 25

BuduArt

GAPS?

INSTITUTIONAL/ CITY/URBAN MASTER PLANNING ACTUALIZATION

TRANSPORTATION AND PUBLIC TRANSPORT FUNCTIONING

- Inconsistent public transport options, leading to limited mobility for both locals and tourists
- Need for **bus, taxi, and shuttle services** connecting key areas

WALKABILITY

- Lack of well-maintained **pedestrian paths and sidewalks**, making walking difficult and unsafe in certain areas
- Need for **bike lanes and walking routes** to encourage active transportation

OVERALL UTILITIES

MANAGEMENT & SUPERVISION

- Inadequate **water, electricity, and waste management** services
- Limited oversight and maintenance of urban infrastructure and public facilities

AGSTEV RIVER REHABILITATION

- The river, a key natural feature, remains underutilized as a potential tourism asset due to **pollution and lack of investment in clean-up and beautification**

WATER SUPPLY & WASTE MANAGEMENT

- Issues with **reliable water supply** during high-demand periods
- Insufficient **waste management systems**, including recycling and waste collection infrastructure

STREET DOGS

- Need for stray **animal control services**

CONNECTIVITY OF REMOTE AREAS

- Lack of access to **remote villages** and areas outside the main cultural, educational, and tourist hubs
- Limited infrastructure for **visitors to explore less-developed areas**

LACK OF PUBLIC SPACES

- Lack of well-established **public spaces** for cultural activities and gatherings

INCLUSIVE INFRASTRUCTURE FOR VISITORS WITH SPECIAL NEEDS

- Need for better **wheelchair accessibility** in public spaces, hotels, and tourist sites

DIGITAL PRESENCE (HIGH QUALITY, COMPREHENSIVE, AND UP-TO-DATE)

- Insufficient **online presence**, including outdated or incomplete websites and social media profiles for tourism-related activities
- Lack of **interactive maps, real-time event schedules, and visitor services** to improve the digital experience for tourists

ACCOMMODATION

ACCOMMODATION LACK OF UPPER- SCALE ACCOMMODATION FACILITIES

- Limited presence of **luxury hotels, boutique resorts, and high-end lodges**
- Few internationally recognized **hotel chains or 5-star accommodations**

LIMITED VARIETY IN LODGING OPTIONS

- Shortage of **thematic and experience-driven hotels** (e.g., eco-lodges, heritage stays, wellness retreats)
- Minimal options for **long-term stays and serviced apartments** catering to digital nomads and business travelers

OPPORTUNITY FOR DESTINATION AND CONCEPT HOTELS

- Potential for **nature-integrated resorts** (e.g., forest cabins, lakefront retreats)
- Space for **historical or culturally themed hotels reflecting** the region's heritage
- Demand for **wellness and spa resorts** leveraging Dilijan's natural resources

GAPS?

SPECIALIZATION & PROMOTION

SPECIALIZATION & PROMOTION LACK OF NICHE TOURISTIC SPECIALIZATIONS

- Limited tailored experiences for **Gen Y/Z** (e.g., digital nomad-friendly spaces, adventure tourism)
- Few offers designed for **elderly travelers** (e.g., wellness retreats, accessible hiking routes)

UNTAPPED POTENTIAL OF MINERAL WATERS

- Mentioned as an attraction, but lacks developed experiences

WEAK INTERNATIONAL PROMOTION AND PRESENCE

- Limited participation in global tourism expos and travel fairs
- Minimal collaborations with international travel agencies and influencers
- Insufficient digital marketing efforts (e.g., lack of targeted social media campaigns, SEO-optimized content)

LACK OF DIVERSE ACTIVITY & ENTERTAINMENT

LIMITED ECO- AND ADVENTURE TOURISM OPTIONS

- Few offerings for **hiking, biking, zip-lining, or water sports**, despite the natural landscape
- Underdeveloped **nature reserves and outdoor activity spaces** for more immersive experiences

1-DAY OUTING ASSETS WITH LIMITED ENGAGEMENT

- Most tours and activities last a maximum of **5 hours**, not allowing enough time to explore fully
- Limited options for **extended or multi-day activities** (e.g., camping, multi-day hikes, guided cultural tours)

UNDERUTILIZED NATIONAL PARK TOURISM POTENTIAL

- National parks and nature reserves not promoted as key attractions
- Missed opportunities for **eco-tourism and wilderness exploration**

LIMITED OPERATING HOURS AND LACK OF NIGHTLIFE

- Activities primarily available from **11am to 8pm**, with few evening or night-time events
- Lack of **nightlife venues** such as bars, cultural events, or live music spots

TIME MOSTLY SPENT IN HOTELS AND RESTAURANTS

- Visitors spend most of their time **eating and resting**, with little entertainment or engagement outside these spaces

ABSENCE OF QUALITY SHOPPING EXPERIENCE

- Limited variety of **local boutiques, artisanal shops, and souvenirs**
- Few options for **luxury shopping or high-end brands**

LACK OF KIDS' ENTERTAINMENT AND PLAYGROUNDS

- Insufficient **child-friendly activities** like amusement parks, playgrounds, or interactive educational spaces

LIMITED CULTURAL AND ARTISTIC OFFERINGS

- **Movie theatres** or screening events for film lovers
- Limited options for engaging with **local art and culture** through exhibitions, festivals, or performances

GAPS?

LACK OF QUALIFIED SUPPORTING PERSONNEL

TOURISM & HOSPITALITY SERVICES

- Shortage of trained staff in **hotels, restaurants, and tourism activities** (e.g., receptionists, tour guides, waitstaff)
- Limited availability of **multilingual professionals** for international visitors
- Insufficient **event management and customer service specialists**

HEALTHCARE & WELLNESS

- Lack of **qualified nurses, doctors, and wellness therapists** for both residents and tourists
- Few **rehabilitation and spa specialists** despite the potential for wellness tourism

TECHNICAL & MAINTENANCE SUPPORT

- Shortage of **skilled personal such as electricians, plumbers** to support growing infrastructure
- Limited availability of **professional cleaning and facility management staff**

LACK OF TRAINED AND QUALIFIED PERSONNEL

THIS INCLUDES:

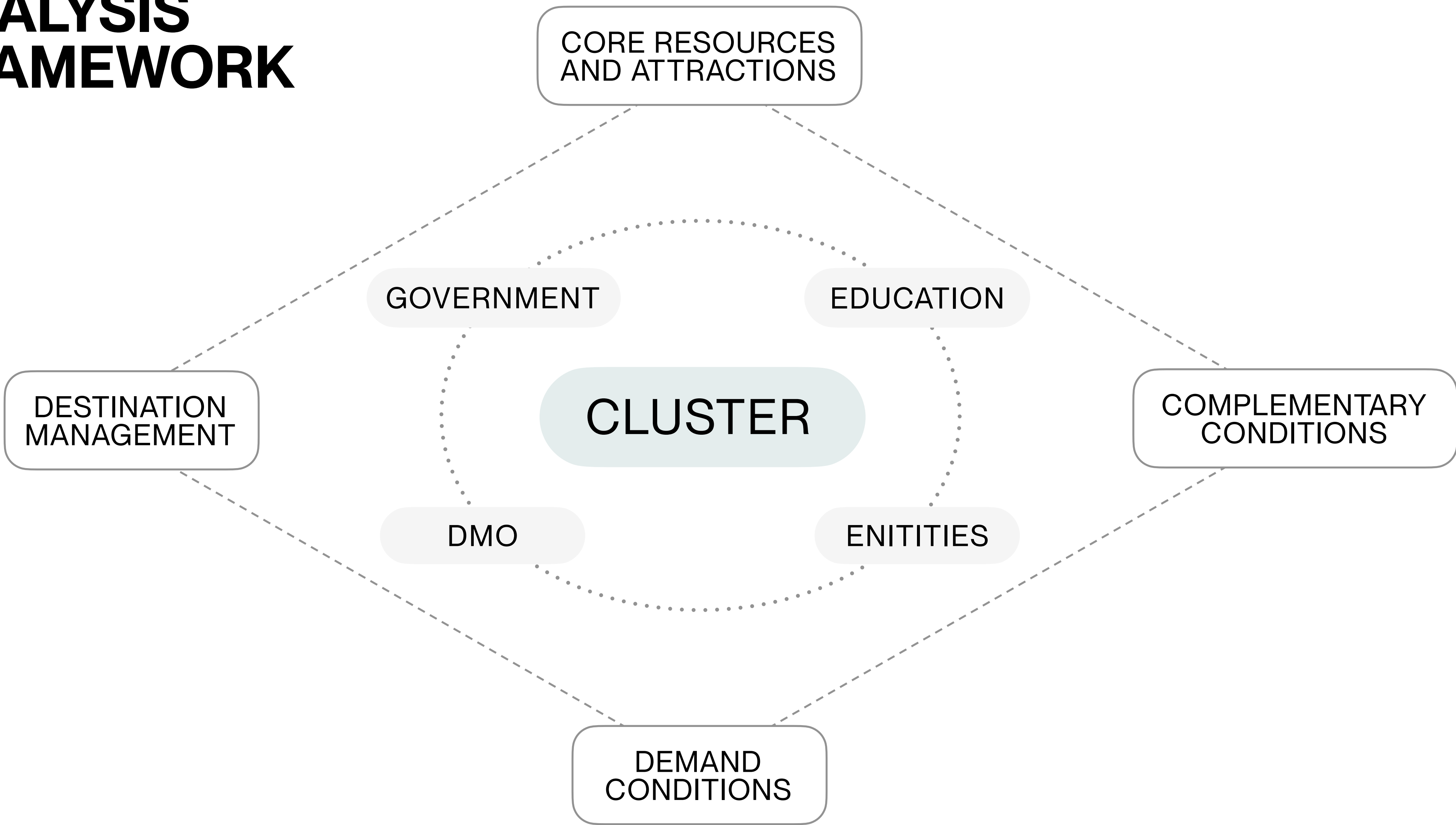
- Knowledge of foreign languages
- Communication skills
- Service provision skills
- Industry-specific training
- Customer service expertise
- Service standards

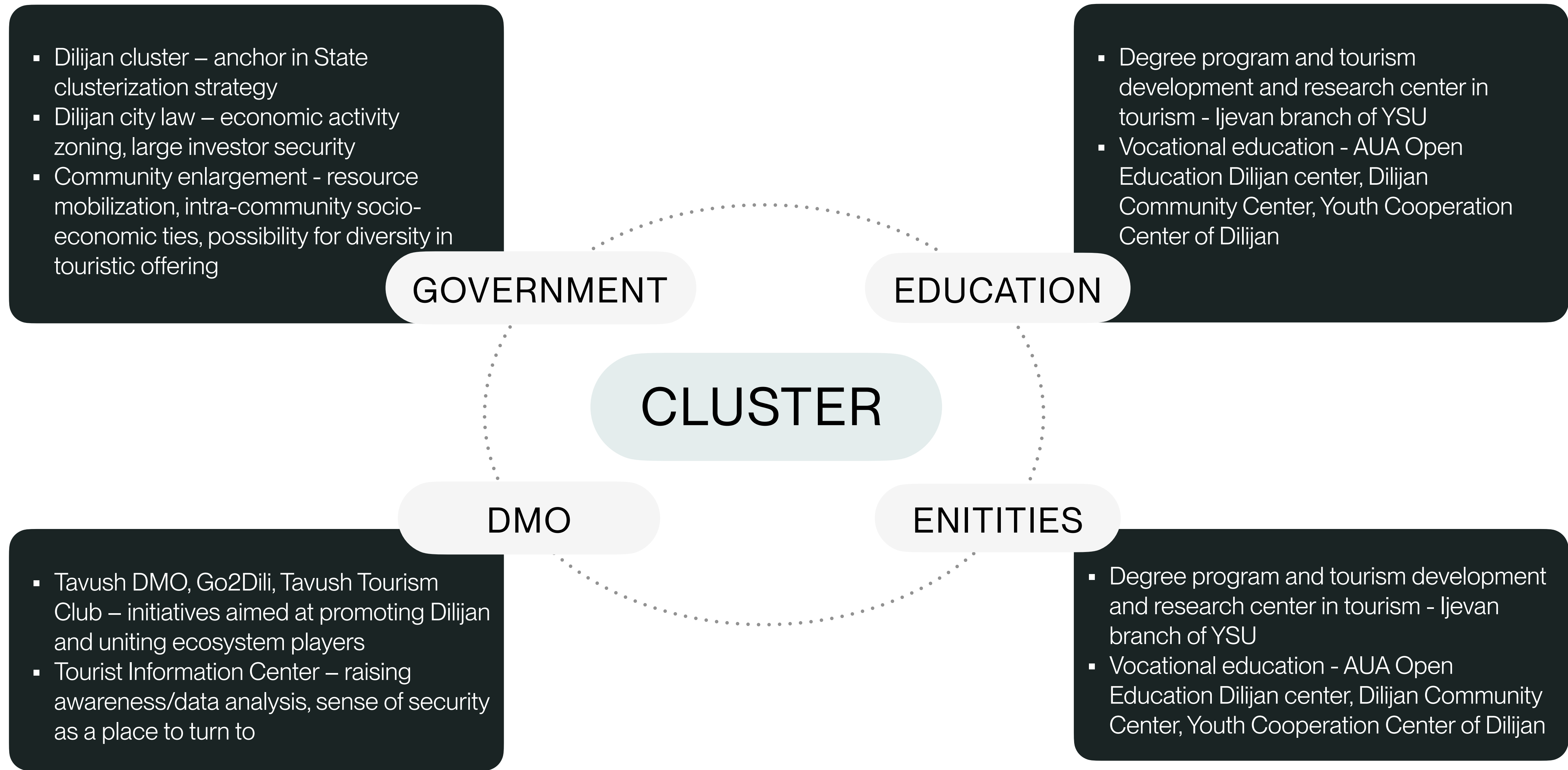
APPENDIX #2

DILIJAN: TOURISTIC OFFER ANALYSIS



CLUSTER ANALYSIS FRAMEWORK





DILIJAN – HOME FOR COUNTRY LEVEL “ISLANDS OF EXCELLENCE”

Since 2010, several anchor investments were made in Dilijan amounting around \$500mn.

One important thing that is common to those anchor investments is the bottom-up strategy towards country development, which is based on the belief that anchor investments made locally can have spillover effects beyond the region, and even the country.

The bottom-up strategy resulted in creation of several “Islands of excellence”, including:

UWC INTERNATIONAL SCHOOL IN DILIJAN

Established in 2014



A model of turning Armenia into an exporter of modern education

RESEARCH AND TRAINING CENTER BANK OF ARMENIA

Established in 2014



A model of decentralization in public governance of Central Bank of Armenia

THE KNOWLEDGE FOR DEVELOPMENT CENTER OF CENTRAL BANK OF ARMENIA

Established in 2014



A model for youth education and lifelong learning

MONTE MELKONIAN MILITARY & SPORTS COLLEGE

Established in 2017



A model of transforming Monte Melkonian Military & Sports College into a Hub for Elite Military Education

TUMO - CENTER FOR CREATIVE TECHNOLOGIES

Established in 2014



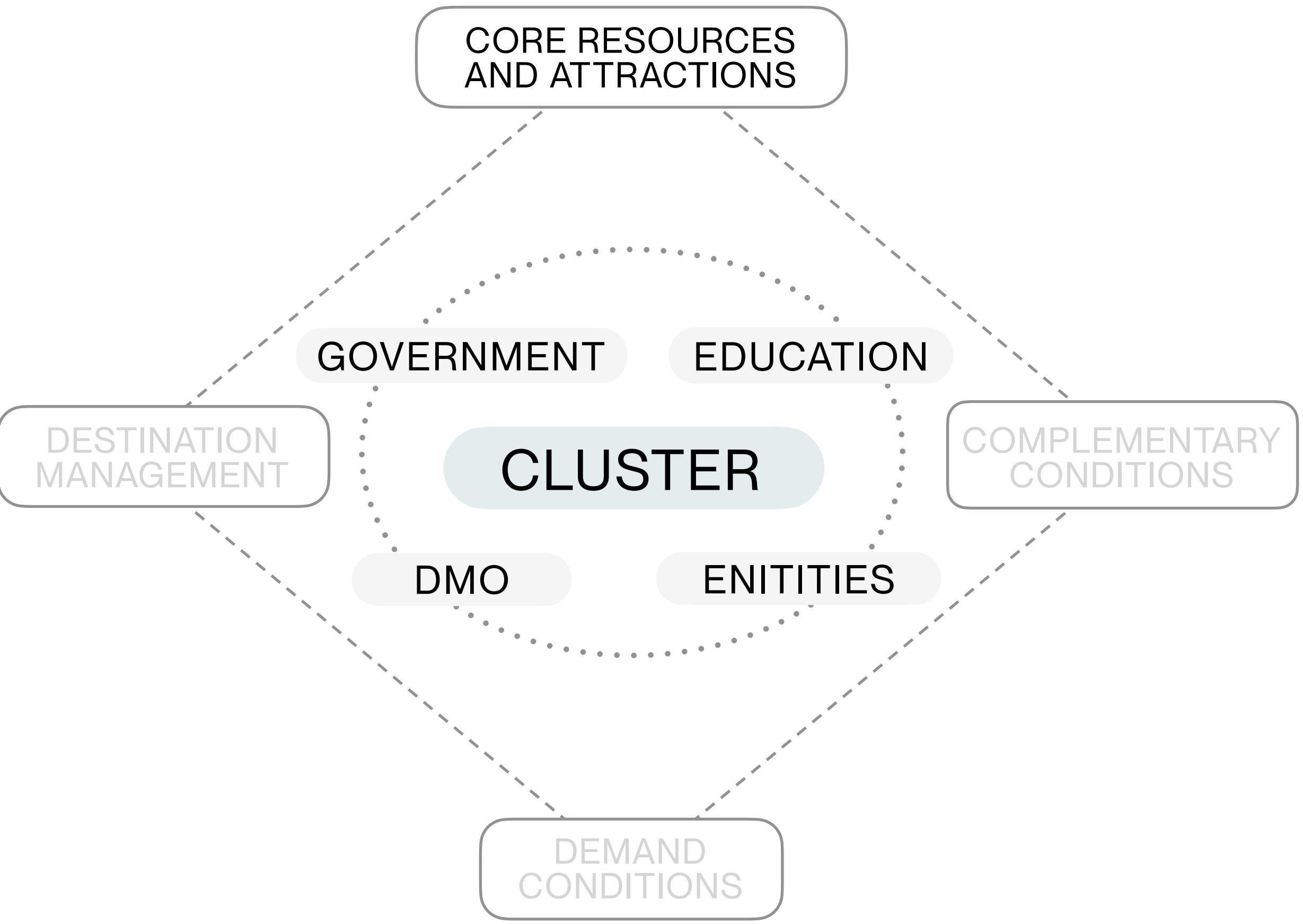
A model of turning Armenia into an Exporter of Modern Education: TUMO - Center for Creative Technologies

AYB SCHOOL

Established in 2014



A model of turning Armenia into an Exporter of Modern Education: AYB School



ENDOWED ASSETS

Dilijan National Park (33,765 ha)

5 natural landmarks, including 2 lakes 1150 plants, 286 species 4 major natural spring waters

303 cultural/historical monuments

40% from medieval ages
5 landmarks dating BC
5 museums

ACQUIRED ASSETS

Ecotourism

80km of Transcaucasian trail, 20+ hiking trails
Camping grounds
Ropepark

Arts and Crafts

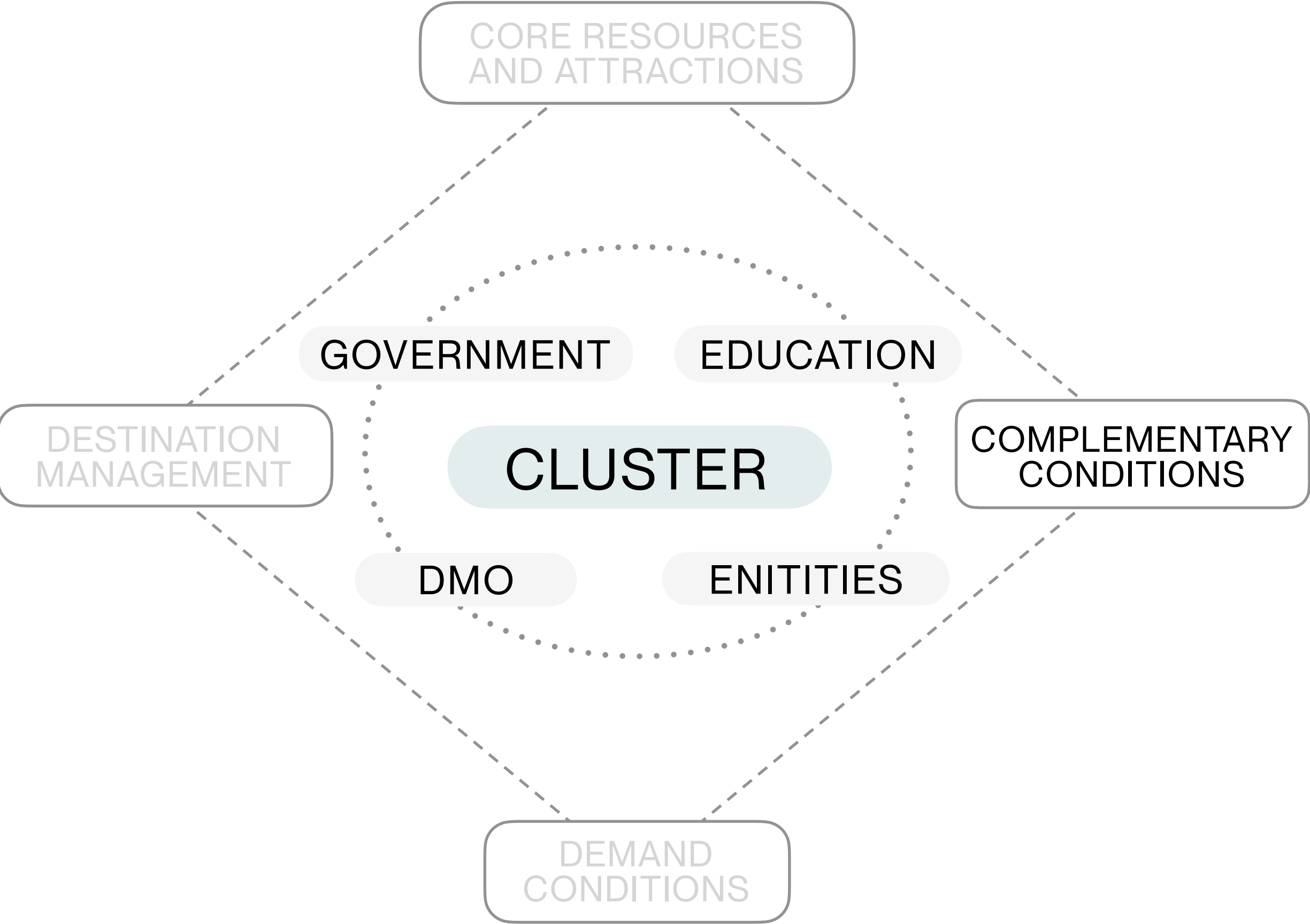
Established community of artists and craftsmen
Old quarters
Brands (MADE, Armenecoop)

Events/festivals

Traditional: Diliton, Vardavar, Gastrofest,
Recurring: Wine Festival at Villa Khanjyan, Financial/banking forums, film/music festivals, etc.
Special: Summit of Minds, Dilijan Art Observatory, Aurora Prize

Local Food

Forest produce – mushrooms, nuts, herbs, spices
Homemade produce – dried fruits, honey, vodka, meat products
Manufactured products - diary, wines, beer, tea, bottled springwater, skincare



ACCOMMODATION

- 150+ facilities, 3000+ beds, standard amenities
- 90% - B&Bs and economy hotels
- <15 mid-scale boutique/concept hotels, B&Bs (ex. Tufenkian, Toon Armenia)
- only 2 large hotels in upper mid-market (Dilijan Resort, Dilijani Tun)
- No hotel in upper market
- Common practice of renting apartments/townhouses during high season
- Emerging trend of building/acquiring summer residences by Yerevan residents/diaspora

RESTAURANTS | ENTERTAINMENT

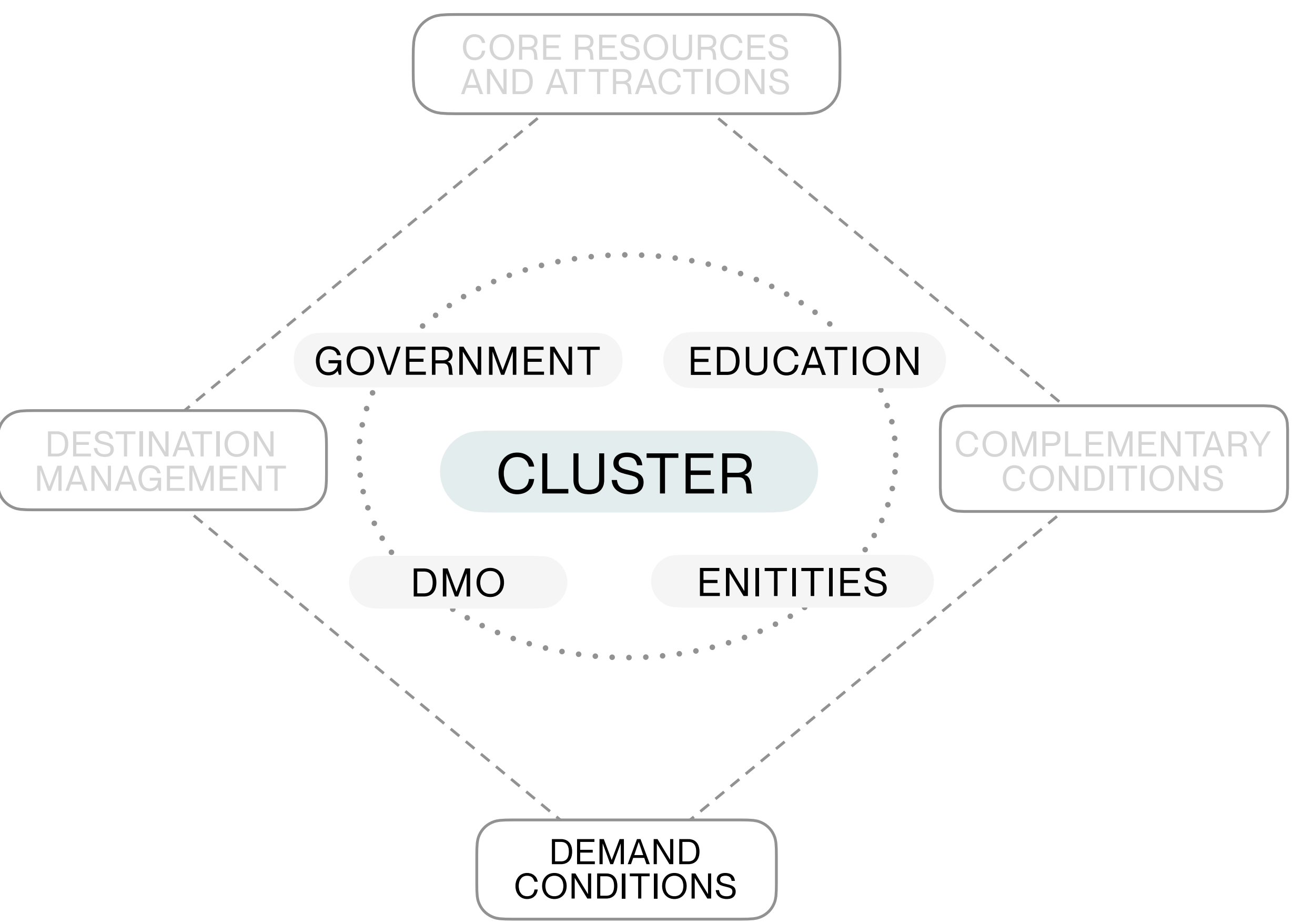
- Distinctive gastronomic experience
- A couple of gourmet-type restaurants
- High concentration of tourist offerings on a couple of streets (Getapnya, Myasnikyan)
- Limited entertainment opportunities (Verev Ropepark, Ditaran Immersive Dome))
- Weak Retail, touristic shopping experience limited to souvenirs/kiosks

TRANSPORTATION

- | | |
|---|---|
| ▪ Important transport hub | ▪ Limited public transport within the town |
| ▪ Important nod in the regular tourist route around Armenia | ▪ Large number of deteriorated streets, sidewalks |
| ▪ Relative proximity to Yerevan | ▪ Non walkable streets, hilly areas |
| ▪ Accessible only by road transport | ▪ Lack of tourist buses parkings |
| | ▪ Lack of camping car's parking |

LOGISTICS AND NAVIGATION

- Lack of navigation onside the City
- Lack of tourist flow regulation in the cultural and natural sites



TOURIST PERCEPTION

- Nested in Nature
- Reputed to be one of the most attractive towns in Armenia
- Often referred to as "Little Switzerland" by virtue of its natural setting
- Home to many Armenian artists, composers and filmmakers in Soviet times
- Largely known as a health spa during the Soviet era

VISITOR PREFERENCES

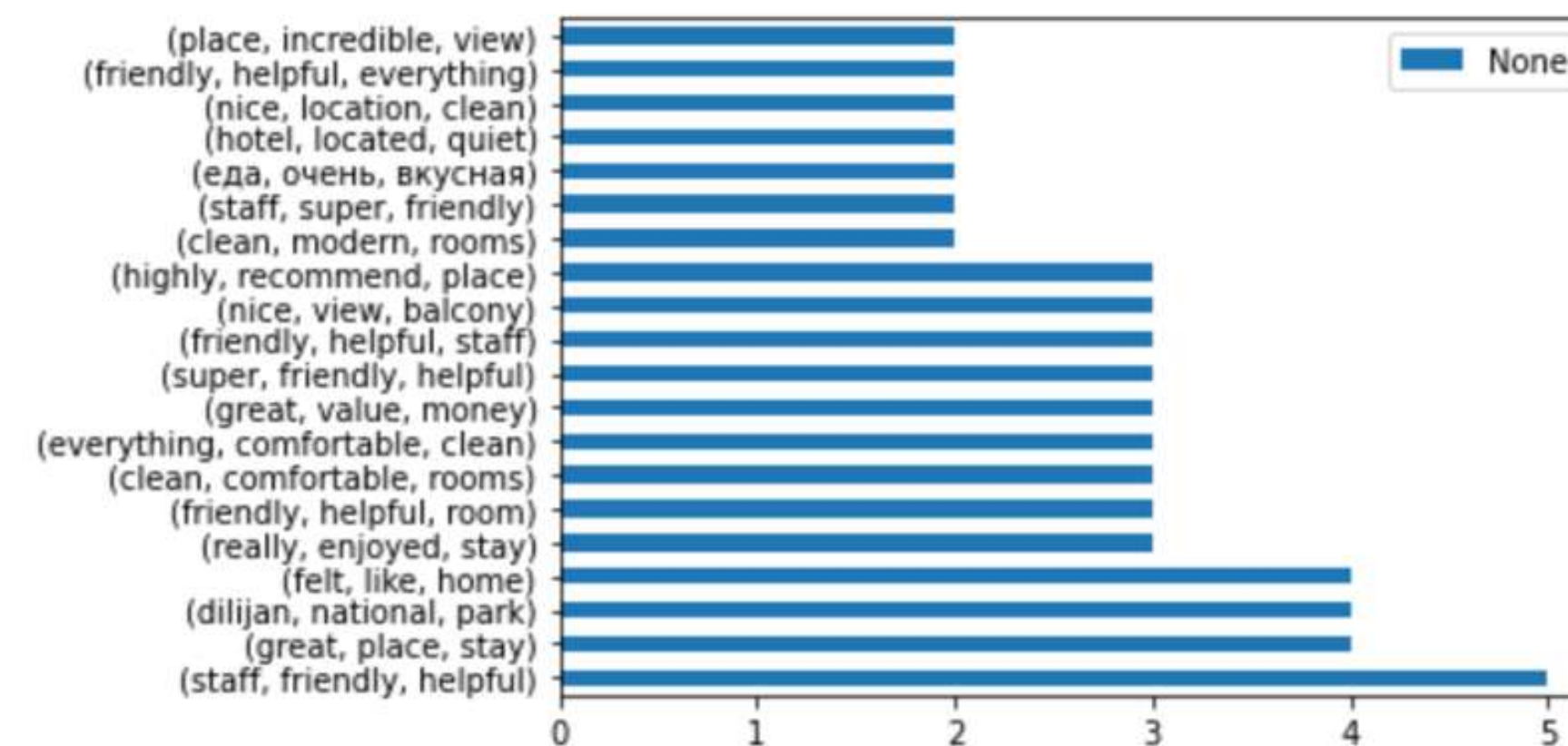
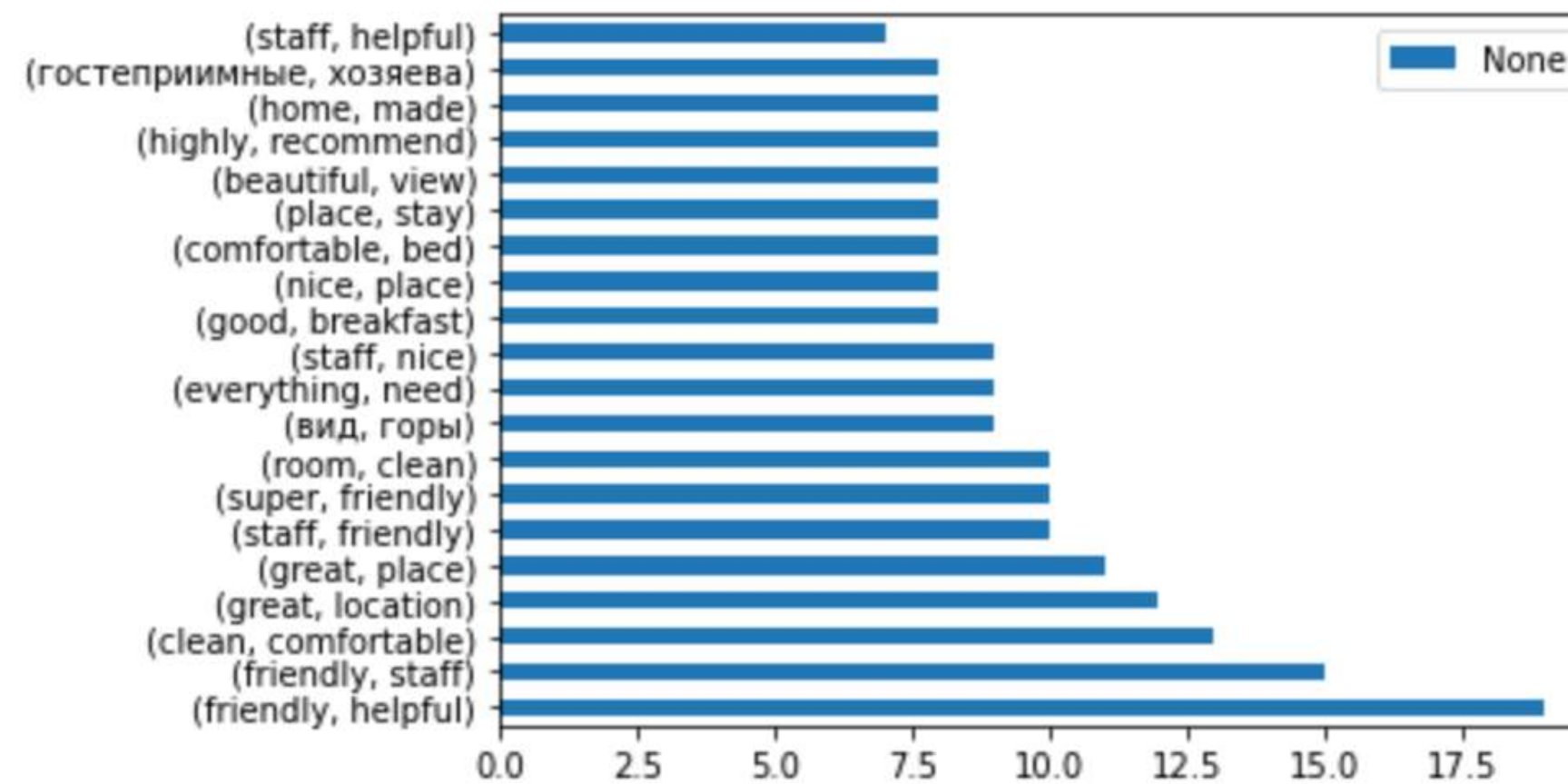
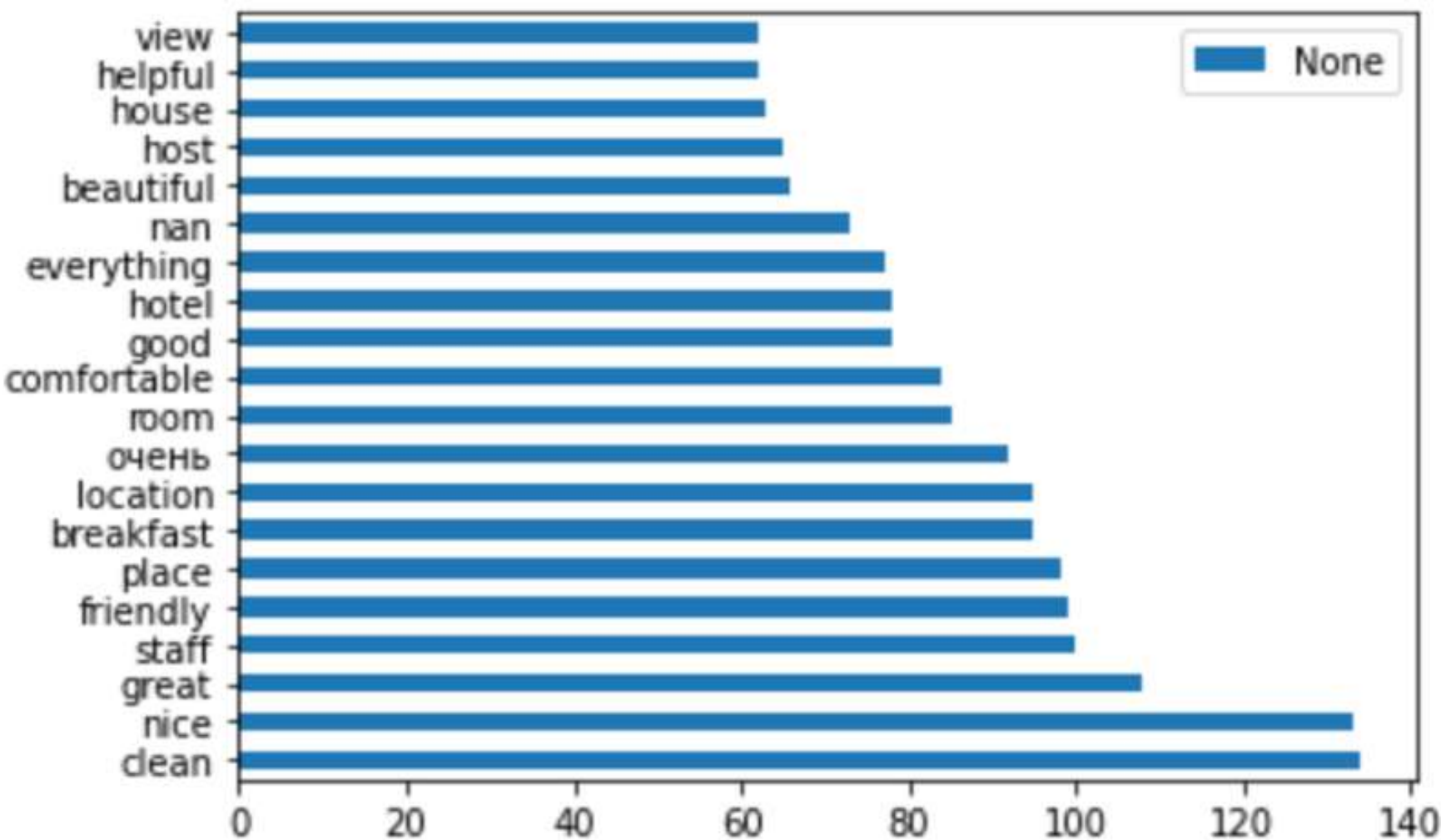
- Visitors mainly drawn by nature, yet passive stay is very common
- Gastronomic experience is second popular reason for visiting
- Emerging interest in eco-, adventure tourism activities
- Families/friends/couples dominate the visitor flow
- High level of seasonality in visitor flows
- Slow tourism is becoming increasingly popular in Dilijan, alongside adventure and cultural tourism.

TOURIST PRODUCT SOPHISTICATION

- Limited integration of available resources/assets in the final tourist products/services
- Tourism value chain dominated by standard economy class offerings/facilities
- No proper value proposition for visitors interested in luxury leisure activities
- No niche specialization, e.g. experience designated for Gen Y/Z, elderly
- No night life or evening leisure and entertainment
- Limited interaction with nature when staying in the city
- Predominance of less sophisticated touristic activities that require less time and spending
- Similar gastronomic propositions

TOURIST PERCEPTION

TOP 20 MOST FREQUENT WORDS/ BIGRAMS/TRIGRAMS IN REVIEWS



- Some of the most frequent words to describe properties in Dilijan have been “clean”, “nice” and “great”, which were named 134, 133 and 108 times respectively.
- As can be seen in the graphs, the most repeated Bigrams are “friendly helpful”, “friendly staff”, “clean comfortable”, “great location” and “great place”
- Although the Trigrams have a lower frequency, they also show the feeling that can be seen in the Bigrams, since the most repeated words are “staff friendly helpful”, “great place stay” or “felt like home”
- Customer feedback highlights positive sentiments regarding the quality of service and the environment. The staff’s friendliness, helpfulness, and the convenient location are key aspects of the experience, suggesting that customers feel welcomed and comfortable, which reinforces the overall positive atmosphere. Anything specific to Dilijan is missing.

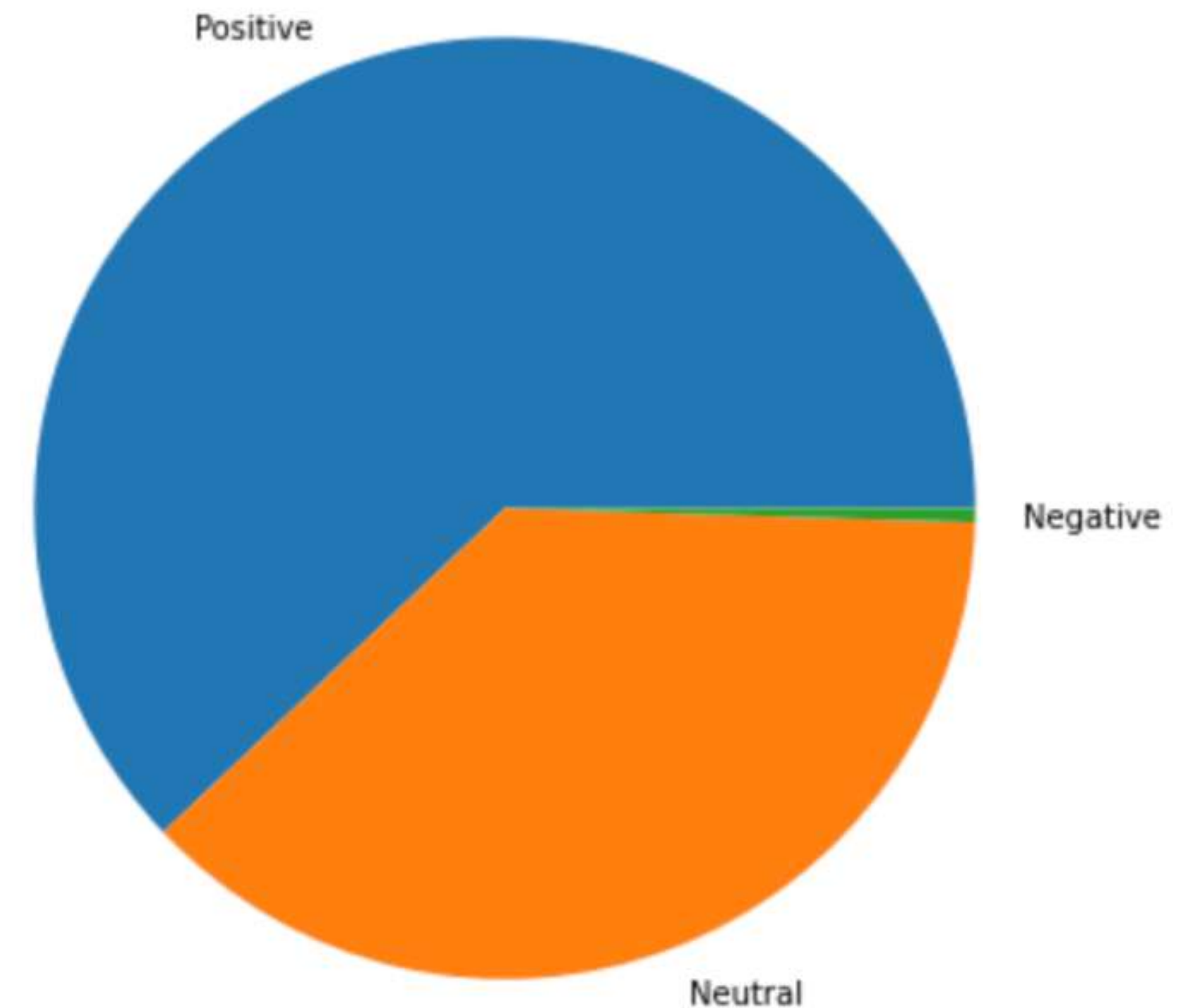
METHOD USED FOR REVIEWS ANALYSIS

Methodology: Natural Language Processing techniques

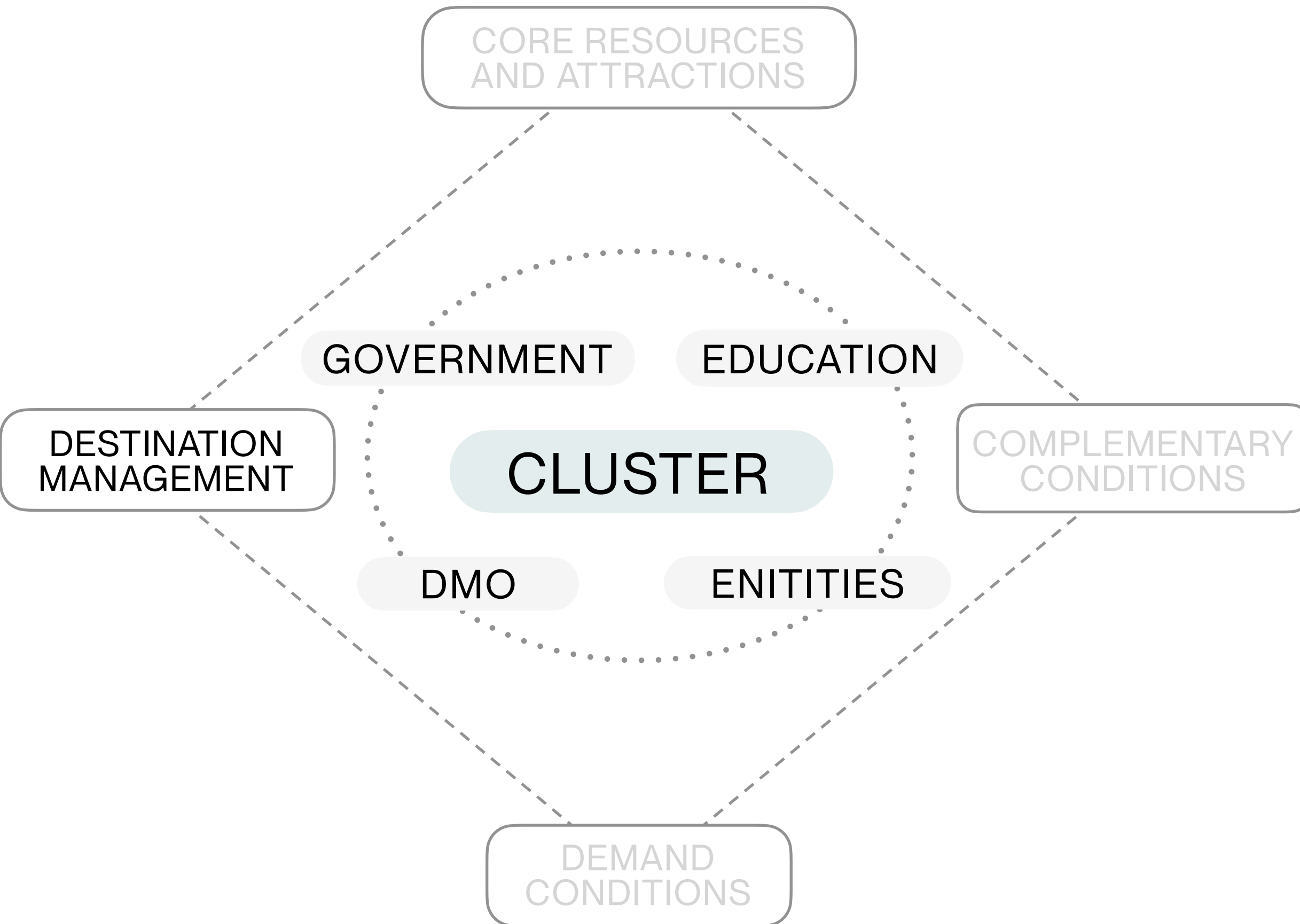
- ✓ To perform the Dilijan Hotel Reviews Analysis, Booking webpage scrape has been used.
- ✓ To analyze the sentiment of the comments, Natural Language Processing techniques have been used, which processed the information in English, French, Russian and German.

Outcome:

- ✓ All the information was extracted from bookings for 2 adults and 1 room between December, 20th and December, 24th of 2023.
- ✓ The analysis is made upon 141 properties and 638 reviews, of which 73 were null reviews.
- ✓ The average price for 4 days stays is 274.39 euros, and the average rating Dilijan hotels received is 8.44 out of 10.



From the 638 reviews analyzed, 396 have been classified as positive, 239 as neutral and 3 as negative.

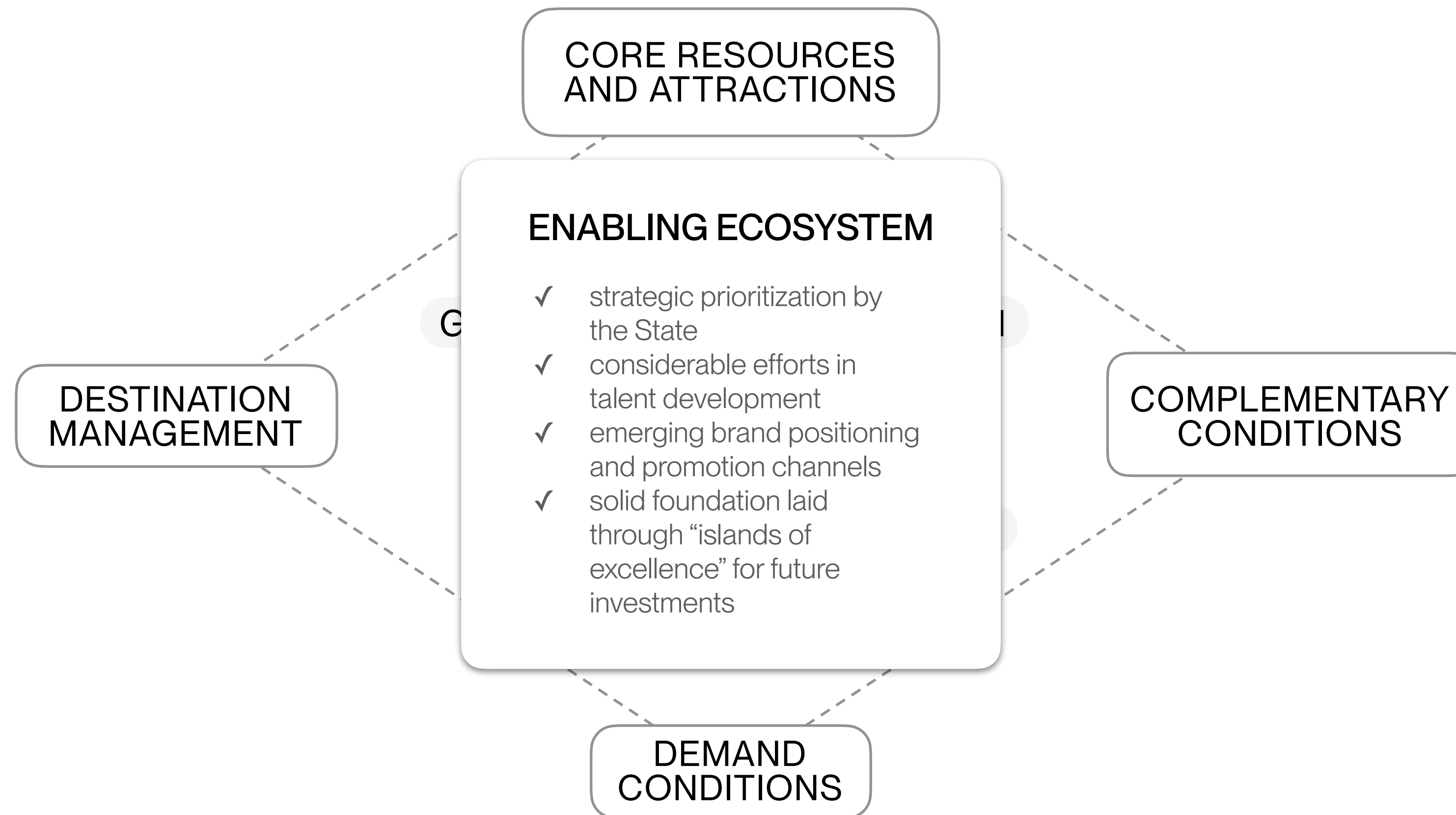


PROMOTION

- ✓ Dominated by private initiatives operating in the field
Tavush DMO - presents the region of Tavush as a destination, sustains Visit-Tavush website
Go2Dili - another DMO, neither part of Tavush DMO nor participating in its activities
Tavush Tourism Club, which has 25 private sectors operators as its members
- ✓ No agreed/coordinated branding and positioning strategy among ecosystem actors
- ✓ High international (e.g. National Geographic, Forbes) and local media exposure thanks to major anchor investments
- ✓ Tourism Information Center – limited capacity for data collection and analysis, lack of insights

PUTTING TOGETHER INSIGHTS FOR EACH CLUSTER FRAMEWORK COMPONENT

- ✓ Rich endowment of natural and cultural assets
- ✓ Wide range of acquired assets
- ✓ A number of successful tourist product cases



- ✓ Predominantly private-led efforts made in silos, great need for cooperation and alignment
- ✓ Substantial record in terms of international media mentions
- ✓ Poor efforts in tourist data analytics

- ✓ Predominantly private-led efforts made in silos, great need for cooperation and alignment
- ✓ Substantial record in terms of international media mentions
- ✓ Poor efforts in tourist data analytics

- ✓ Great legacy and popularity in post-Soviet area
- ✓ Mostly associated with family/friends type vacations
- ✓ Emerging trends in eco-/adventure tourism
- ✓ High seasonality of visitor flow
- ✓ Limited niche specialization

APPENDIX #3

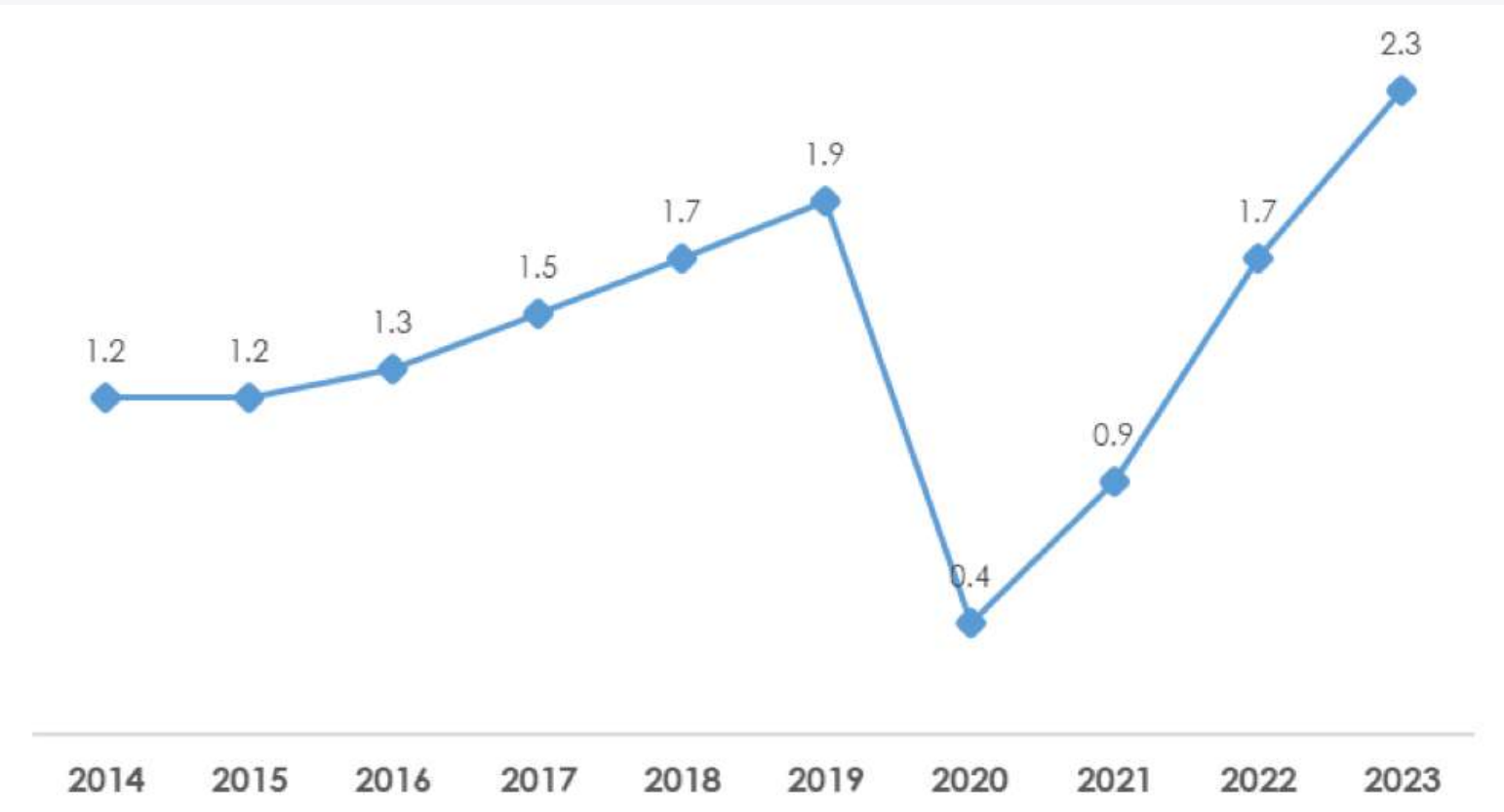
TOURISTIC DATA SNAPSHOTS

ARMENIA | DILIJAN

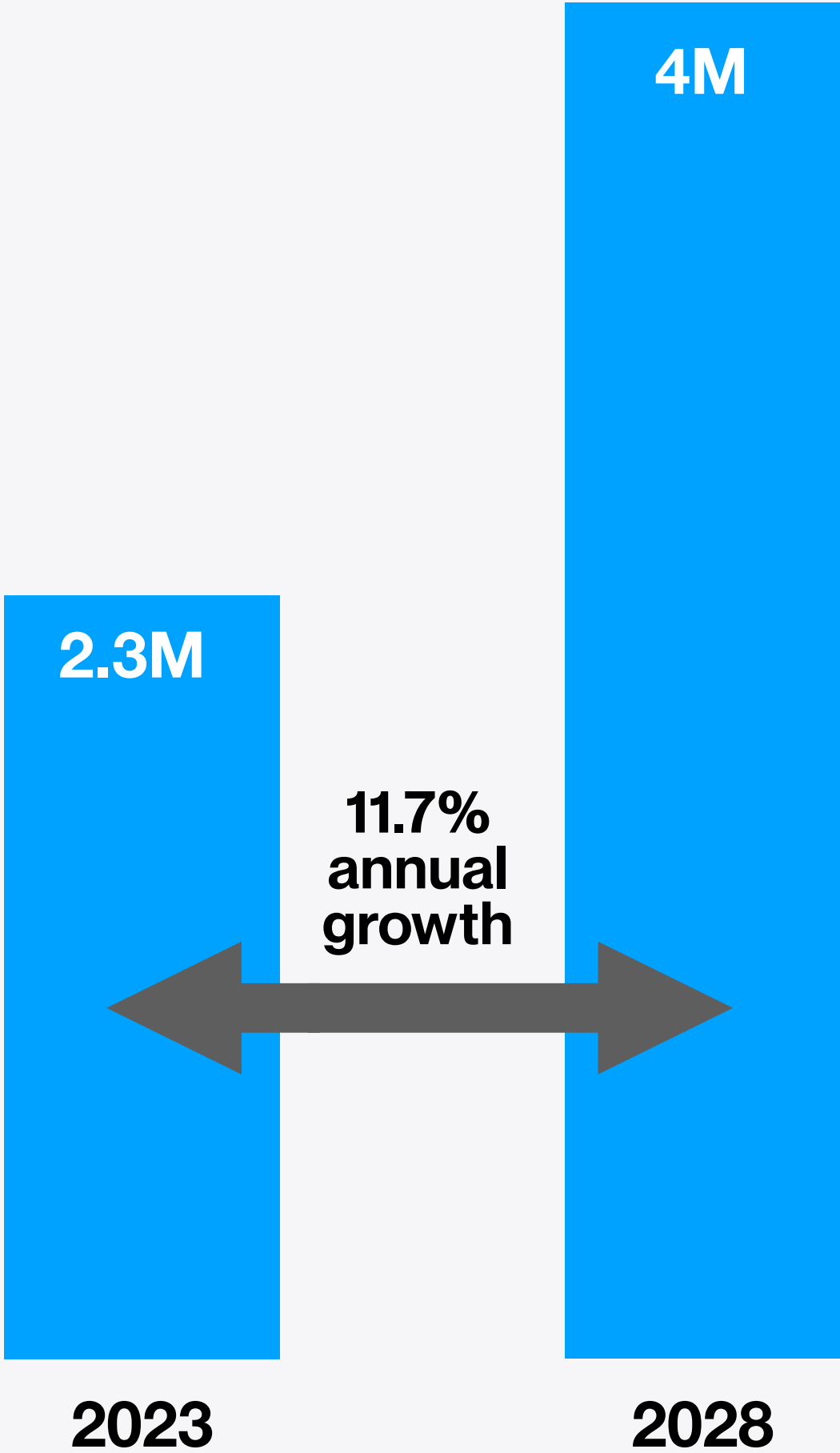
“

In 2023, the country reached a record-breaking 2 million visitors, marking a 40% increase from 2022 and a 22% increase from 2019.

INTERNATIONAL TOURIST ARRIVAL
(MILLIONS)



State strategy for tourism aims for **11.7% annual growth rate in international visits and spendings.**

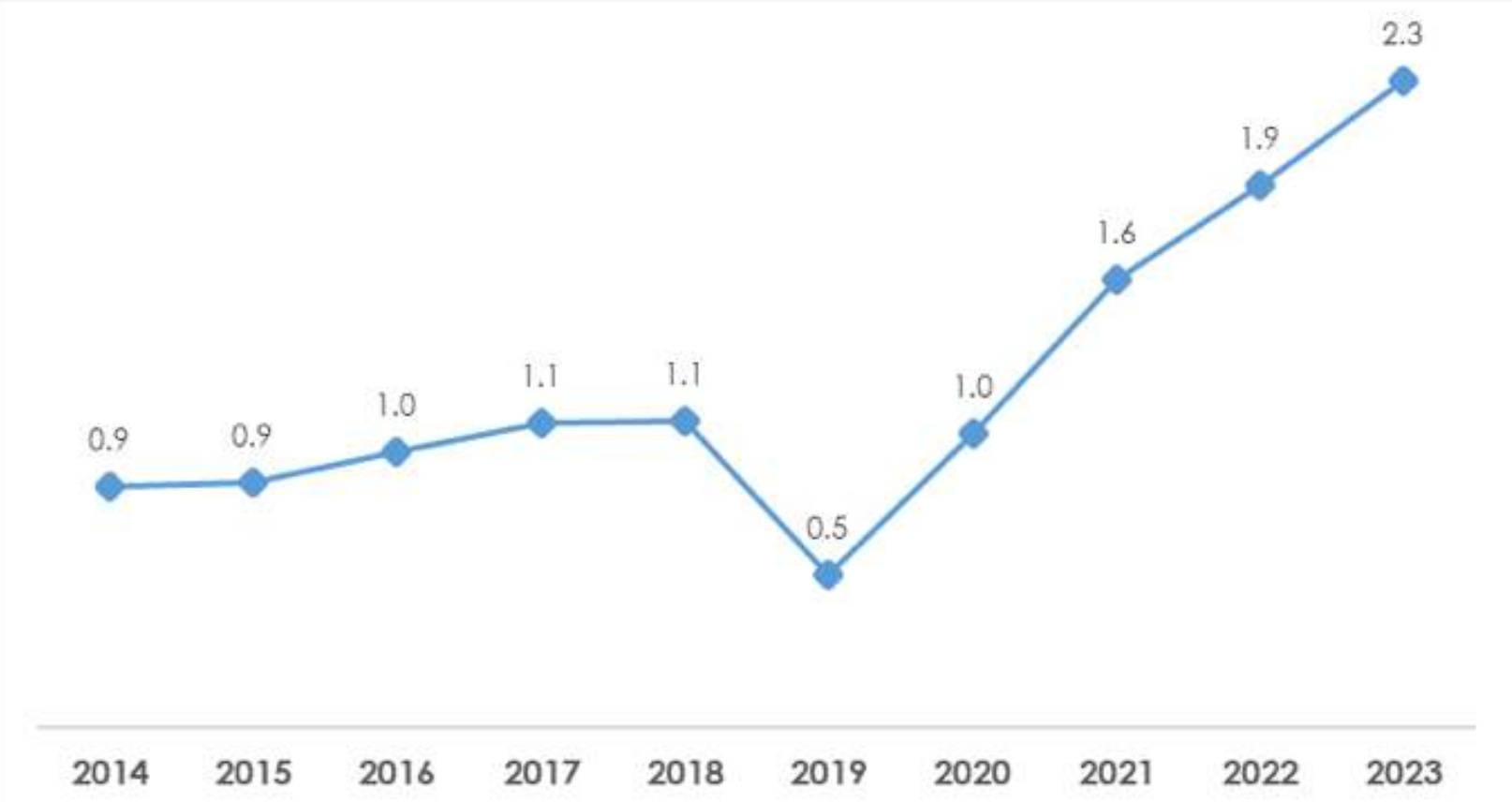


“

Armenia’s domestic tourism is experiencing a strong momentum

Domestic tourism statistics is based only on overnight stays and is not taking into account daily travelers who visit touristic sites without an overnight stay. Some of the more popular facilities with domestic tourists include spas and sanatoriums where they can receive treatments such as mud baths, massages, and more.

DOMESTIC TOURIST ARRIVAL
(MILLIONS)



Source: Statistical Committee of the Republic of Armenia

METHOD USED FOR REVIEWS ANALYSIS

Tourism sector in Armenia is considered as a “pocket of productivity” that holds the promise of enhanced trade and productivity outcomes in the future.

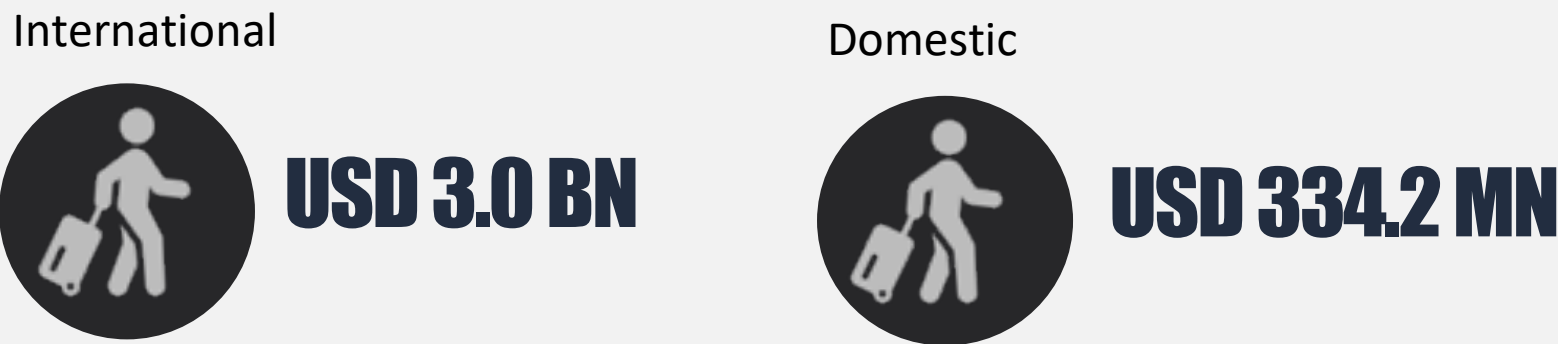
In 2023, total Travel and Tourism contribution to Armenia’s GDP stood at 13.2 percent and amounted to a total of US\$3.4 billion. This growth supported a total employment (direct plus indirect) of ~176,300 people, equaling to 14.8 percent of Armenia’s total employment.

International visitor spending was USD 3 billion. In 2023, 64% of international arrivals reached the country by air, against 36% by land. Personal leisure travels contributed to 93% of visitor spending, against 7% of business and professional travel.

Contribution to GDP & Employment 2023



Visitor Spend 2023



Source: WTTC

Visitors from France, Germany, United Kingdom, & United States exhibit a pronounced preference for **cultural heritage**, over natural resources, positioning Armenia as a highly targeted destination.

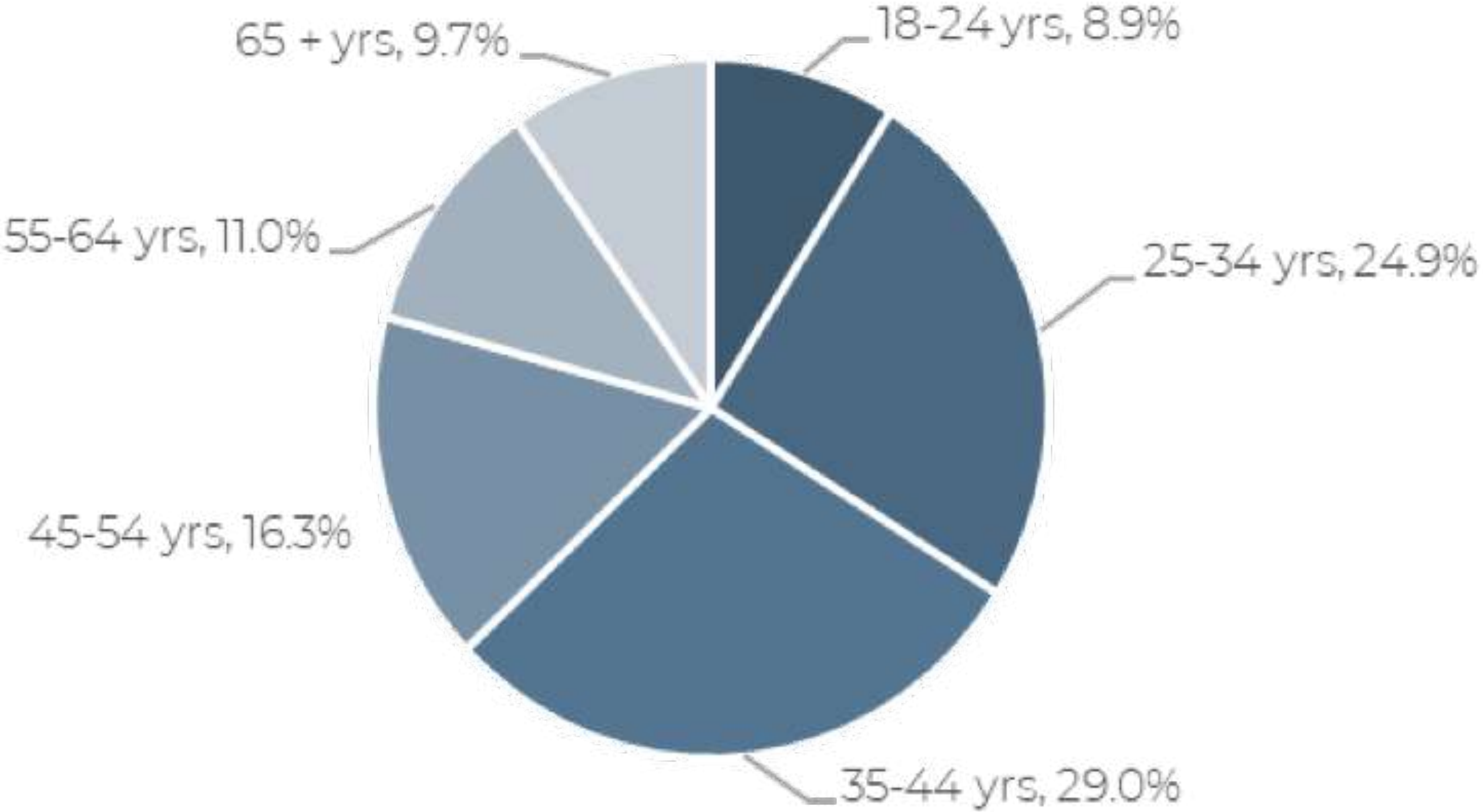
SHARE OF REASONS
FOR CHOOSING
ARMENIA AMONG TOP
MARKETS



Source: International Visitor Survey on National Level, 2024

ARRIVALS TO ARMENIA PER AGE GROUP. 2023

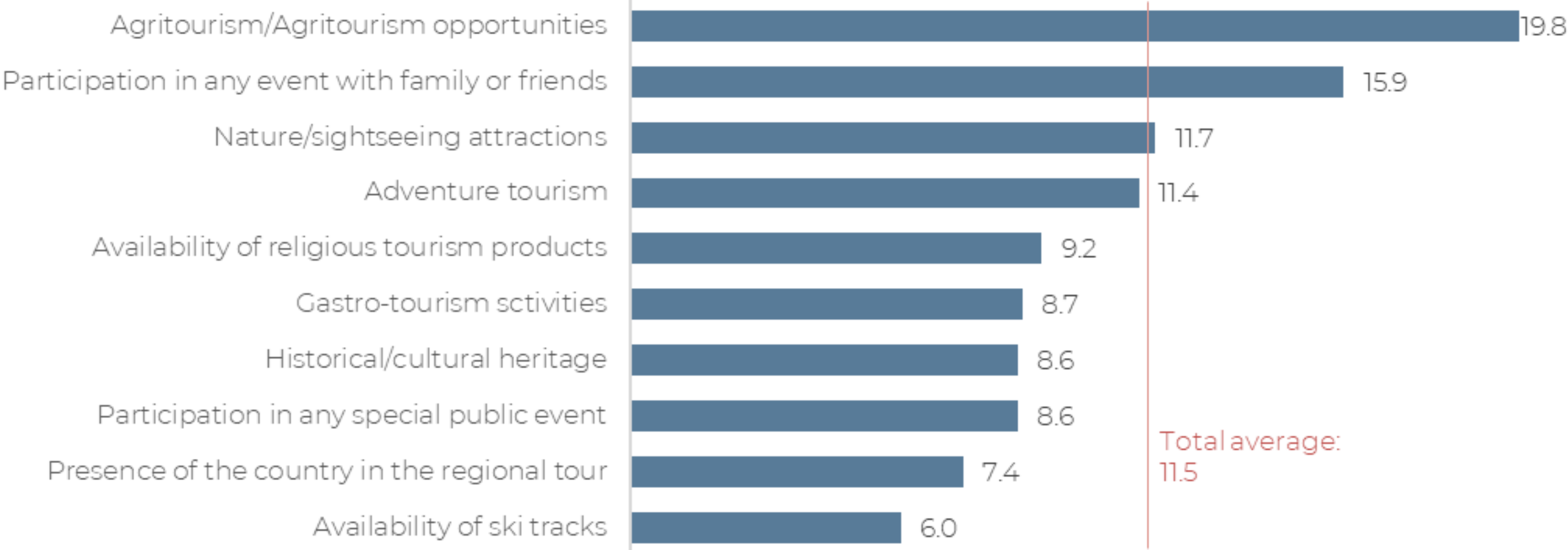
- In 2023, international visitors to Armenia tended to be relatively young, with 63% of them being under 44 years old.
- Notably, the age group of 35-44 represented 29% of arrivals, indicating significant potential within this demographic.
- Visitors over the age of 55 constituted 21% of the respondents, and within this group, 10% were over the age of 65.



Source: International Visitor Survey on National Level, 2024

LENGTH OF STAY OF TOURISTS PER REASON FOR CHOOSING ARMENIA (IN NIGHTS)

- The average length of stay of international tourists to Armenia in 2023 was 11.5 nights.
- However, there are notable differences in terms of the reasons for choosing Armenia as a holiday destination. Visitors motivated by “Nature/ sightseeing attractions” stayed for 11.7 nights on average, while those drawn by “Historical/cultural heritage” stayed for 8.6 nights, and those seeking “Gastro Tourism” experiences stayed for 8.7 nights.
- The longest stays were for those interested in “Agritourism opportunities” (19.8 nights) and “Participation in events with family or friends” (15.9 nights), while the shortest stays were for those visiting Armenia for “Skiing tracks” (6 nights).



Source: International Visitor Survey on National Level, 2024

18.8% OF TOTAL TOURISTS VISIT TAVUSH

- Over 8% of the accommodations are concentrated within the Tavush region, where popular tourism destinations such as Dilijan and Yenoqavan are situated.
-
- What is interesting to note is the different aptitude to discover attractions around Armenia: provided that 100% of tourists move from Yerevan, French, German and USA tourists are the most inclined to spend time visiting Armenian regions, even on a same-day visit.

	TOTAL	RUS	GEO	IRA	UAE	USA	FRA	GER	UK	CYP	CHI
Yerevan	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Aragatsotn	4.0%	3.6%	2.0%	0.0%	7.7%	6.5%	8.9%	5.4%	0.0%	0.0%	0.0%
Ararat	15.3%	16.7%	4.9%	1.8%	14.8%	24.7%	25.6%	20.4%	20.7%	5.3%	12.5%
Armavir	7.5%	8.0%	3.8%	1.1%	4.4%	16.1%	11.1%	10.8%	8.5%	1.3%	4.2%
Chegarkunik	35.8%	38.1%	17.3%	28.4%	39.8%	40.9%	38.9%	39.8%	29.3%	24.0%	16.7%
Lori	4.0%	3.5%	3.5%	0.4%	2.0%	9.7%	7.8%	9.7%	3.7%	2.7%	4.2%
Kotayk	31.8%	34.7%	12.2%	9.1%	42.0%	39.8%	35.6%	40.9%	30.5%	25.3%	16.7%
Shirak	7.8%	8.7%	4.0%	2.1%	4.2%	5.4%	14.4%	12.9%	3.7%	2.7%	4.2%
Syunik	8.0%	7.7%	2.4%	4.6%	8.0%	15.1%	17.8%	12.9%	8.5%	4.0%	2.1%
Vayots Dzor	9.9%	9.6%	3.3%	1.8%	15.0%	19.4%	14.4%	17.2%	15.9%	5.3%	12.5%
Tavush	18.8%	19.8%	9.3%	6.7%	17.7%	0.0%	28.9%	2.2%	17.1%	10.7%	12.5%

Source: International Visitor Survey on National Level, 2024

KEY INSIGHTS FROM INTERNATIONAL VISITOR SURVEY 2024

VISITOR LOYALTY AND SATISFACTION:

- **97%** of all visitors are likely to return to Armenia, with high return rates consistent across all age groups and genders.
- **99%** of visitors with Armenian ancestry intend to return, reflecting a strong connection to the destination.
- **99%** of visitors would recommend Armenia as a travel destination.
- **Independent travelers** show a higher likelihood of returning compared to those on package tours, with only **3%** of independent travelers unlikely to return, versus **12%** of package tour visitors.

Source: International Visitor Survey on National Level, 2024

KEY INSIGHTS FROM INTERNATIONAL VISITOR SURVEY 2024

EXPENDITURE & FOCUS AREAS

- **Focus on Leisure Tourists:** Leisure tourists have the highest daily expenditure at US\$ 63 per day, compared to US\$ 43.5 for VFR tourists. On the other side, they are characterized by short length of stay: while the overall average stay is 15.3 days, leisure tourists only stay for 11.5 days on average. Extending this figure would increase total expenditure. Again, a strategic focus would target the leisure visitors to develop and promote premium experiences and packages for specialized offerings in areas like adventure tourism, wellness, gastronomy, or cultural immersion.
- The data suggests a limited luxury or premium tourism products that could attract higher-spending visitors. Moreover, only 2.4% of expenditure goes to visits and sightseeing, indicating limited tourism product offerings or uptake. The offering for high-end targets should include premium products and experiences that command higher prices: accommodations, dining options, and unique, immersive cultural and nature-based experiences to cater to luxury travelers.

Source: International Visitor Survey on National Level, 2024

TIC VISITOR STATISTICS TO DILIJAN PER YEAR/COUNTRY

based on TIC Tourist Statistics (2018-2024)

YEAR	NUMBER OF TOURISTS	TOP 3 COUNTRIES		
2018	1,882	1. GERMANY	2. FRANCE	3. ITALY
2019	5,762	1. GERMANY	2. FRANCE	3. USA
2020	2,869	1. RUSSIA	2. USA	3. SPAIN
2021	6,500	1. RUSSIA	2. FRANCE	3. GERMANY
2022	8,549	1. RUSSIA	2. FRANCE	3. GERMANY
2023	6,569	1. RUSSIA	2. FRANCE	3. GERMANY
2024	5,181	1. GERMANY	2. RUSSIA	3. FRANCE

APPENDIX #4

DILIJAN: IDENTITY

HISTORY | IDENTITY | LIFESTYLE | ASPIRATION

DILIJAN TODAY IS A PLACE OF **RESIDENCE FOR**

PERMANENT RESIDENTS/DILIJANTS

(only a small portion of them relates to
early settlers, including Molokans)

PEOPLE FROM YEREVAN, ARMENIAN DIASPORA,

internationals/expats who have permanent jobs at
various public/private facilities established
recently

STUDENTS OF UWC DILIJAN FROM VARIOUS COUNTRIES

and American University of Armenia staying
in Dilijan for up to 2 years

LABOR MIGRANTS FROM NEIGHBORING CITIES/

Labor migrants from neighboring cities/
communities commuting back and forth
on a weekly/monthly basis

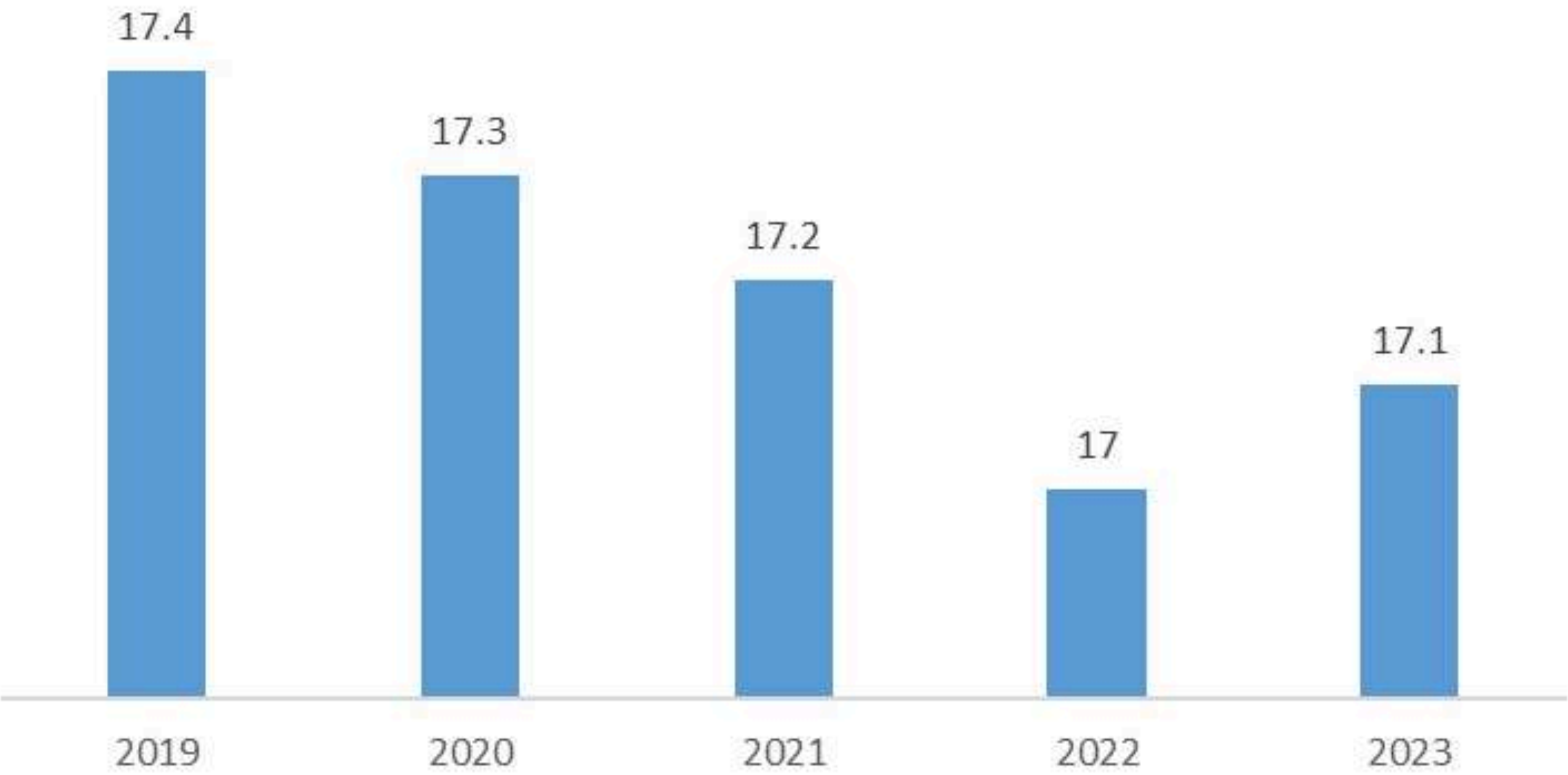
DISPLACED ARMENIANS

from areas affected by the wars in Artsakh
and subsequent displacement of Artsakh
Armenians in 2020 and 2023

PEOPLE RELOCATED AFTER RUSSIAN-UKRAINIAN

after Russian-Ukrainian conflict in 2022

DILIJAN, NUMBER OF DEJURE POPULATION, 1000 PERSONS



Source: Statistical Committee of the Republic of Armenia

RESIDENTS

Despite the permanent dominance of external agenda on the town’s development and governance, quite different patterns among residents are observed for the past century, during which Armenia spent 70 years as a Soviet Union member state and 30 years as an independent country.

	Pre-Independence (before 1991)	Post-Independence (after 1991)	Commentary
Pattern N1: # of permanent population	Grown multiple times	Not changed	During the Soviet era, the permanent population of Dilijan grew multiple times, while after 1991, it was nearly halved due to migration, and not changed since 2010, despite massive scale of investments.
Pattern N2: resident’s rationale for stay	Voluntary choice	Forced to relocate	During the Soviet era, visitors of Dilijan were voluntarily choosing Dilijan as a destination for better health, wellness, education, livelihood, while since independence many of the newcomers live in Dilijan because of circumstances that are partially out of their control
Pattern N3: length of stay/ planning horizon	Short-term stay/defined agenda	Min 1 year/highly uncertain future outlook	During both periods, the newcomers didn’t see themselves staying in Dilijan for a long period of time, however if during the Soviet times the visits were mainly pre-planned vacations/retreats not exceeding a few months, the period after independence has mainly seen people moving to Dilijan for at least a year, with no clear understanding of what will happen to them in future

RESIDENTS

Since 2020, Dilijan became a host to three Black Swans with both positive and negative impacts on the economy and urban landscape of Dilijan.

	COVID-19 GLOBAL PANDEMIC (2020-2021)	44-DAY WAR IN ARTSAKH (2020)	RUSSIAN-UKRAINIAN WAR (2021-PRESENT)
IMPACT +	▪ Boost in domestic tourism, new services/offerings to cater domestic visitor’s needs ▪ Boost in real estate market driven mainly by Yerevan residents who decided to buy/build an apartment/villa for city getaways ▪ Drastic decrease in international tourism ▪ Additional expenditures/investments in businesses to recover from shock	▪ New services/offerings in hospitality emerged from culture brought by displaced families from Artsakh ▪ Increased level of resilience and will to bound back and build a better future ▪ Increased competition for limited opportunities for livelihood ▪ Severe need in psycho-social support to recover from human and other losses ▪ Increased economic vulnerability of local households affected by war	▪ Quality workforce, specialized in urban planning, architecture, management, marketing and promotion ▪ Increased demand for better public infrastructure, quality of hospitality services ▪ New businesses and urban initiatives ▪ New role models/example of community activism and inclusion ▪ Tensions between locals and newcomers threatening the social cohesion within the city
-	▪ Households thriving to maintain the pre-pandemic level of livelihood		

DEEP ANALYSIS INTO EXISTING
ANTHROPOLOGICAL STUDIES HIGHLIGHT
SEVERAL IDENTITY LAYERS THAT ARE OF
UTMOST VALUE TO MAKE CONCLUSIONS AND
DECISIONS FOR FUTURE

BEFORE 1830

TSARIST ERA

SOVIET ERA

POST SOVIET

2000s

ATTRACTIVE & DESIRABLE

Dilijan, an ancient habitat, has long served as a crossroads of trade and culture, maintaining its distinctive architectural charm. People come and go was a normal set of things.

The establishment of Russian military unit boosted the urban development. The influx of people from neighboring areas and Molokan families settle here founding villages of Papanino and Golovino during 1848-49. This brought the division of Old Takh and Nor Takh.

Wealthy Armenians and merchants from Tbilisi & Baku built their **summer houses** in line with Tbilisi urban architecture of that period.

Home for many prominent establishments of its time: **well-being tradition with Gymnasium in the Forest**, the oldest public library, etc.

IDENTITY LAYERS

ANCIENT HABITAT
WITH ARTS & CRAFTS



HISTORIC
STYLE



MIX OF CULTURES



INTELLECTUAL
CONTENT

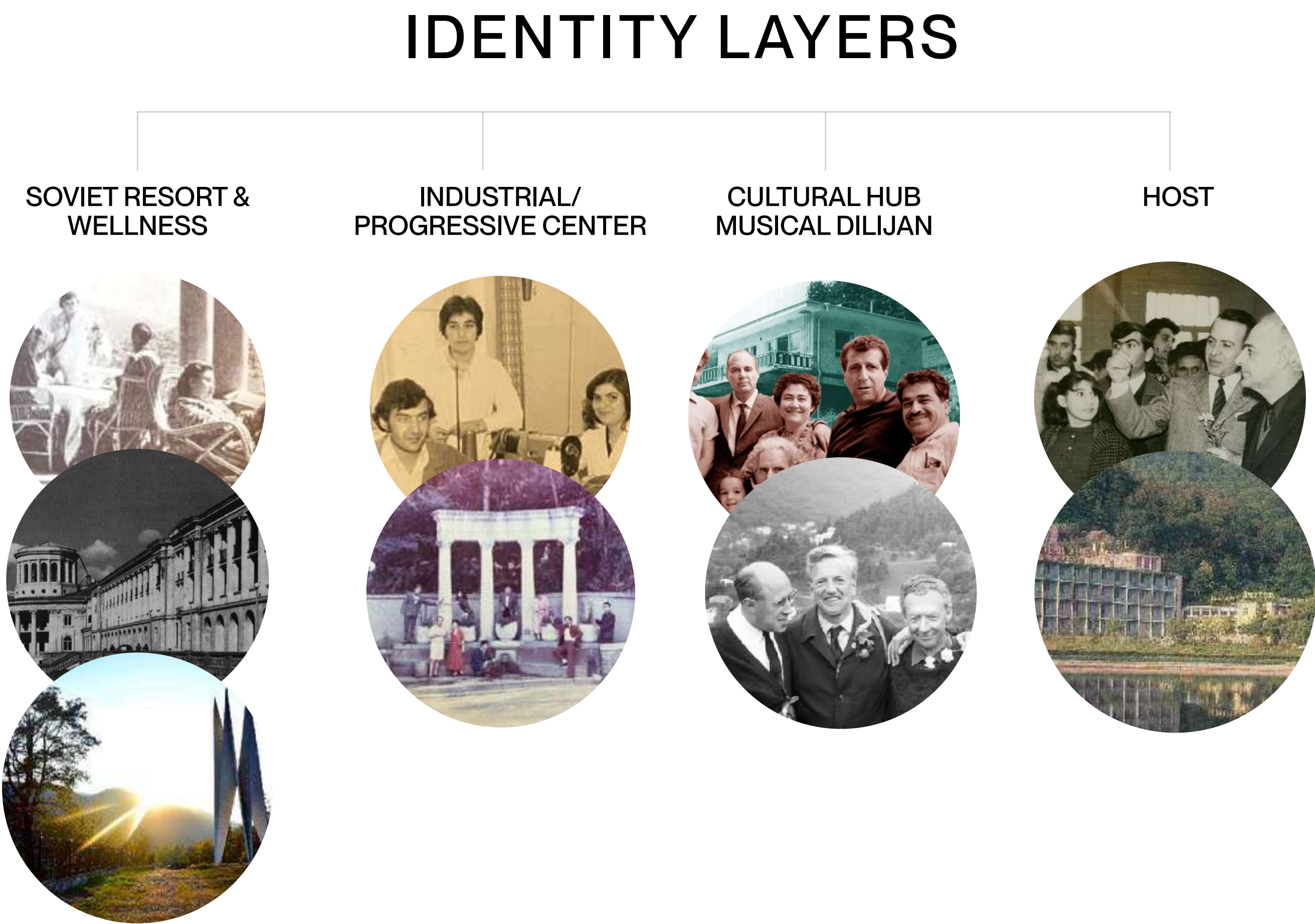


PROVINCE, ~~NOT PROVINCIALITY~~

During the Soviet era, Dilijan evolved into **a dynamic industrial, cultural center for the region, and a notable wellness destination.**

The city thrived with music, orchestras, cinema, cultural events throughout the week, fostering a vibrant social, intellectual, and cultural urban lifestyle. **Renowned creators came from around the world, seeking healing, inspiration, and even on-the-spot creation. They are perceived to have made a huge artistic influence and input in the development of local arts, crafts and talents.**

Provider of jobs and livelihood for neighboring communities, overall dynamic and fast city rhythm.



DOMINANT LAYER: **THE HOST, CENTRAL AND CULTURAL**

Historiographic and Anthropological studies highlight the long lasting legacy of Dilijan as a Host.

First the Russian Military community set the tone, then frequent visits of Soviet elite, artists and celebrities **created a perception of importance and uniqueness, easily internalized by local residents.**

This logically contributed to the perception of its uniqueness for both inside and out.

Пропаганда культуры: мобильная культура - Если ты не идешь к культуре, культура придет к тебе

Мобильная культура

Хотя местные жители рассказывают о реалиях насыщенной культурной жизни, но это во многом было результатом государственной политики. При горкоме был пропагандистско-просветительский отдел, который занимался популяризацией культуры, целый госаппарат работал над привлечением людей к культуре. “А если не приходили, то было наоборот — несли культуру в народ”. В Дилижане эта система, в отличие от других мест, работала очень хорошо, так как в городе были проблемы с передвижением из-за рельефа местности, гос. учреждения в центре находились далеко, то связанные с ними мероприятия проводились в отдаленных кварталах. Например, в городе было три кинотеатра, в том числе передвижные кинотеатры. Кинотеатр и концерт вывозили в горы, организовывали слушания для односельчан, проводивших там лето. В Джрохерском и Головинском районах были дома культуры. В этих районах не было нужды в рекламе, повседневной городской практикой**.

Культура в кармане

В настоящее время интерес людей, по причине многих факторов, та экономической и городской жизни, в век интернета снижается искусство без особой пропаганды уступают место массовой культур

-Когда-то здесь была активная культурная жизнь: посещение театра, кино, городские мероприятия, богатая культурная городская инфраструктура — все это составляло важную часть городской идентичности дилижанцев советского поколения.*

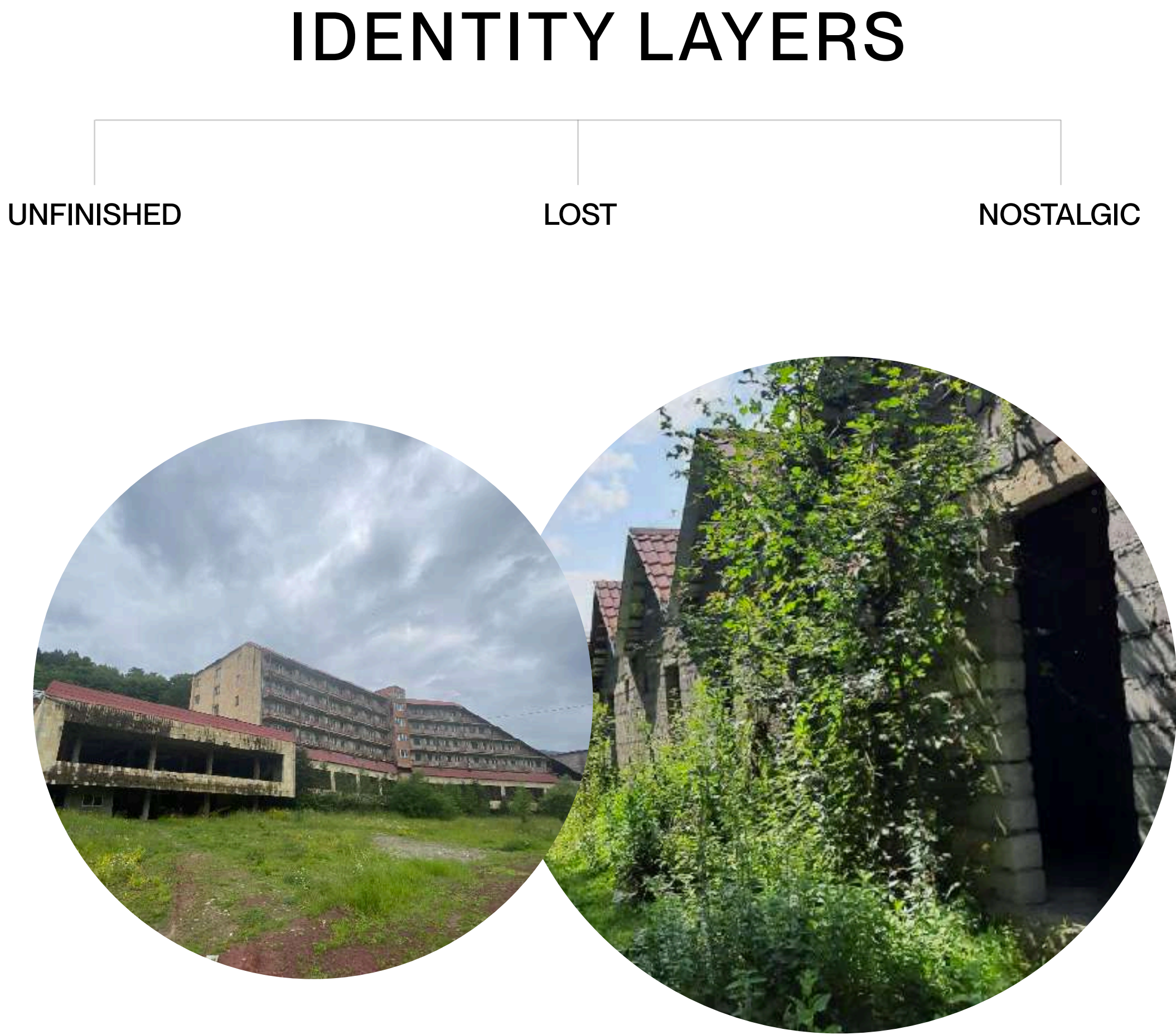
Source: Snapshots from Anthropological Research for Karifabrika

THE PAUSE! LOSING A UNIFIED TOURISTIC VISION

The deep crisis, mass emigration (from overall Armenia and Dilijan).

Factories and recreation areas, public territories were privatized, illegal deforestation.

The resort function and reputation was not maintained, the existing infrastructures left from the Soviet period were not re-invented.



NARRATION RESTARTS FROM THE OUTSIDE

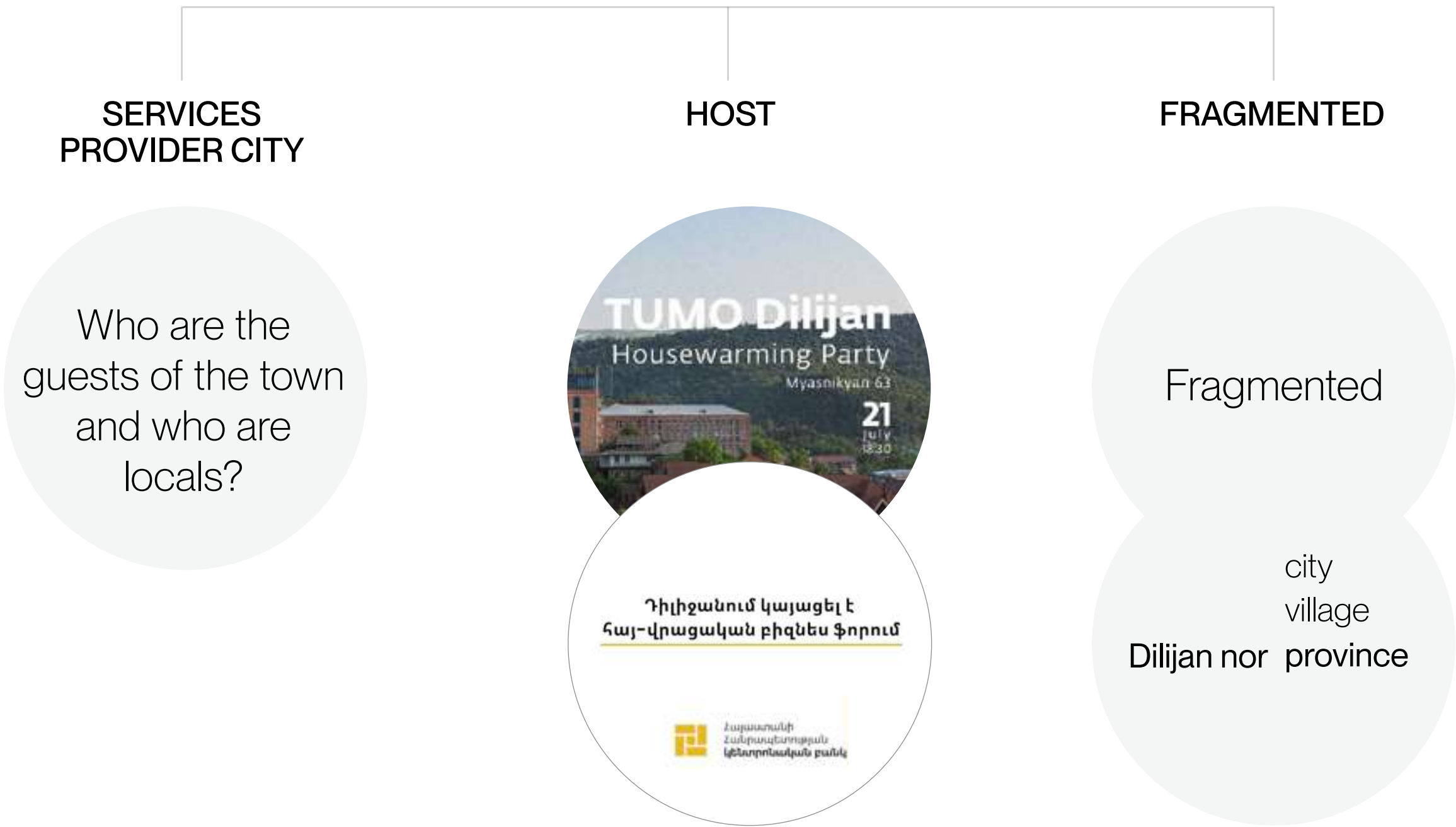
In the spread of all its history, Dilijan hosted a blend of different cultures and backgrounds. Today, experts often mention that Dilijan is considered to have a quiet fragmented identity - **there is no single, unified understanding of the city identity among residents/visitors.**

Since 2000s, external investments started the re-habilitation process of Dilijan.

Meanwhile, various affluent people and institutions, as well as advisors and experts on urban planning, architecture, etc, were not from the city, or even the region, some of them with no intention for relocation.

#Gentrification #neocolonialism

IDENTITY LAYERS



DILIJAN STANDS FOR...?

HOW THE HISTORIC EVENTS SHAPED THE **LOCAL IDENTITY?**

WHO IS WE CALL **DILIJANTSI?**

DILIJANTSI: PASSIVE /DETACHED

Elite institutions in Dilijan create a divide, as locals have limited access, fueling tension and alienation towards both these institutions and outsiders. This dynamic leads locals to resist engaging with external researchers.

Newcomers also face difficulty integrating, with most locals working low-wage jobs, deepening the "local" vs. "outsider" divide. The growing influx of outsiders intensifies identity shifts, with local nationalism emerging.

However, this archetype may be evolving. Increased youth engagement in creative industries, tech, education, and civic action is challenging these stereotypes and could reshape the community’s dynamics.

Source: Snapshots from Anthropological Research for Karifabrika

Социокультурные особенности дилижанцев: авто-(эмический) и гетеростереотипы (этический)

Дилижанец: (эмические оценки)

- Интроверты, медлительные, безынициативные, ленивые, спокойные, пассивные*****
- Закрытые, мнительные
- Предрасположенность к искусствам (особенно живопись, музыка), ремеслам (резьба по дереву, камню, вышивание, ковроткачество), области IT (в т.ч. роботостроение, программирование)
- Гостеприимны
- Город мигрантов, которые становятся “своими”, создавая новые городские традиции
- Знаменитые семейные династии (поэтов, музыкантов, учителей, др.)
- Интеллигентны
- Связь с природой (мягкостью климата объясняется высокий творческий потенциал горожан*)

Дилижанец: (этические оценки)

- Пассивные, интроверты, медлительные, безынициативные, ленивые**, спокойные (такая характеристика городского объясняется социально-экономической историей города, чаще всего занимавшего нишу сервиса: обслуживание гарнизона, лечебницы, санатории, финансового центра, туризм, - во всех этих сферах местное население в основном в роли услуги)***.
- Сочетание неприятия чужих**** и толерантности
- Самокритичность*****

COMMUNITY IDENTITY GAP

Fragmented, nostalgic perception of urban identity between the Soviet and post-Soviet generations

PAST —————> PRESENT —————> FUTURE

HAPPY
SOVIET PERIOD

cultural, dynamic, urban rhythm,
desirable place, a center

IN THE MAKING

Host as a given, more in terms
of geography

UNCERTAIN

passive attitude
providing/consuming tourism,
not leading it

TODAY, MORE OFTEN DESTINATIONS TRY TO SYMBOLIZE CERTAIN LIFESTYLES. WHY?

According to **Tourist Identity Theory**, individuals often seek out destinations that align with their **aspirational identities and resonate with existing/desirable self-image**.

The model reshuffles from “I’ve been there, I’ve seen that” to “I am what I choose = I am where I go”.



DILIJAN USED TO HAVE A LIFESTYLE! IT NO LONGER DOES...

THE CITY HAD A HUMAN FACE -
CITIZENS WERE THE EMBODIMENT AND
MANIFESTATION OF THE LIFESTYLE.

Theatre, Music, Art, busy workdays and noisy
evenings used to be the vibe of the city. Citizens
who worked hard, later culturally entertained hard!



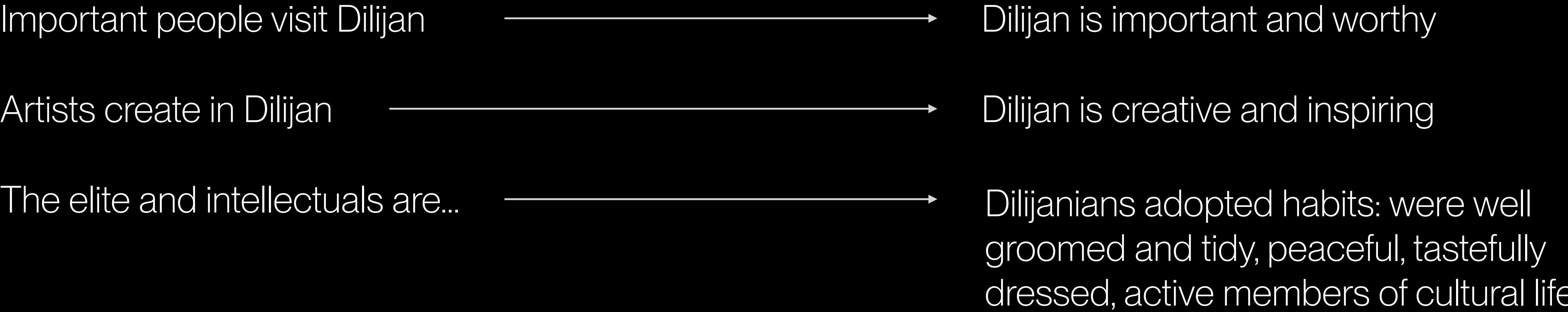
This resulted from a
peculiar assimilation process:
longing to be similar with, being part
of the prominent visiting community.



BEING AN “ARISTOCRAT”
MEANT PARTICIPATION
IN CITY EVENTS WITH
UTMOST EAGERNESS

QUOTE FROM
ANTHROPOLOGICAL INTERVIEWS

INTERNALIZATION MECHANICS



TODAY, NATURE IS THE NUCLEUS OF LOCAL IDENTITY!

DUE TO ITS UNQUESTIONABLE
OBJECTIVITY, **NATURE BECOMES THE
UNIFYING CHARACTER OF THE PEOPLE.**



Locals attribute the creative potential among local population of craftsmen and artisans to the **“special air” and nature that infuses inspiration.**

INTERNALIZATION MECHANICS

**NATURE = GREEN CITY =
FRESH AIR = FRESH IDEAS**

IT WOULD BE SAFE TO ASSUME THAT
NATURE ENTHUSIASM COULD BECOME
THE NEW LIFESTYLE OF THE DESTINATION.

Meanwhile, there is a widespread behavior and registered cases of spoiling the river by residents themselves. Absence of significant nature preservation and nature related behavioural patterns and initiatives among local population put this scenario at risk to be yet another externally narrated idea that has no substance.

VISITOR PERCEPTION GAP

Dilijan lacks an aspirational lifestyle pattern as a destination

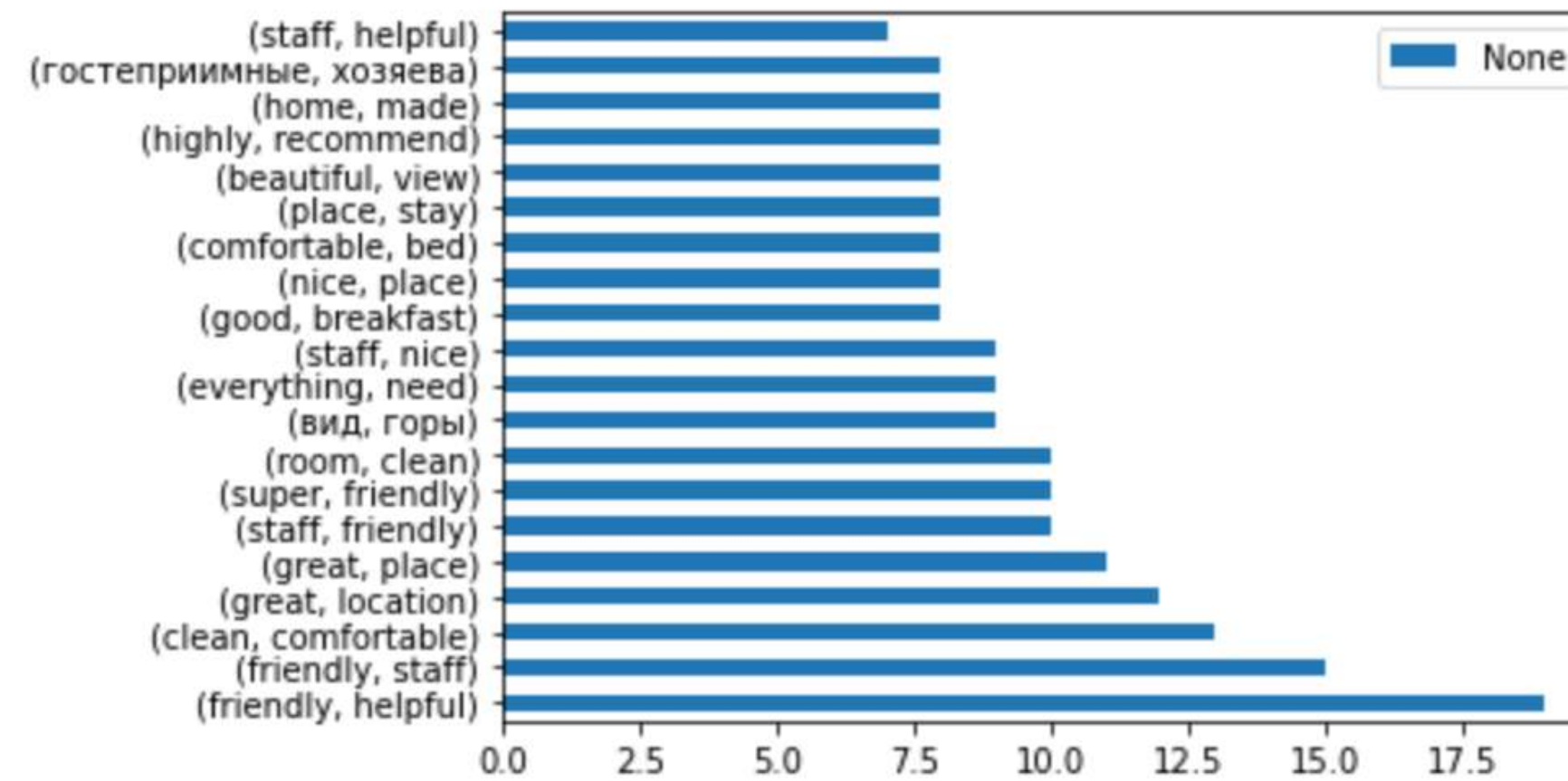
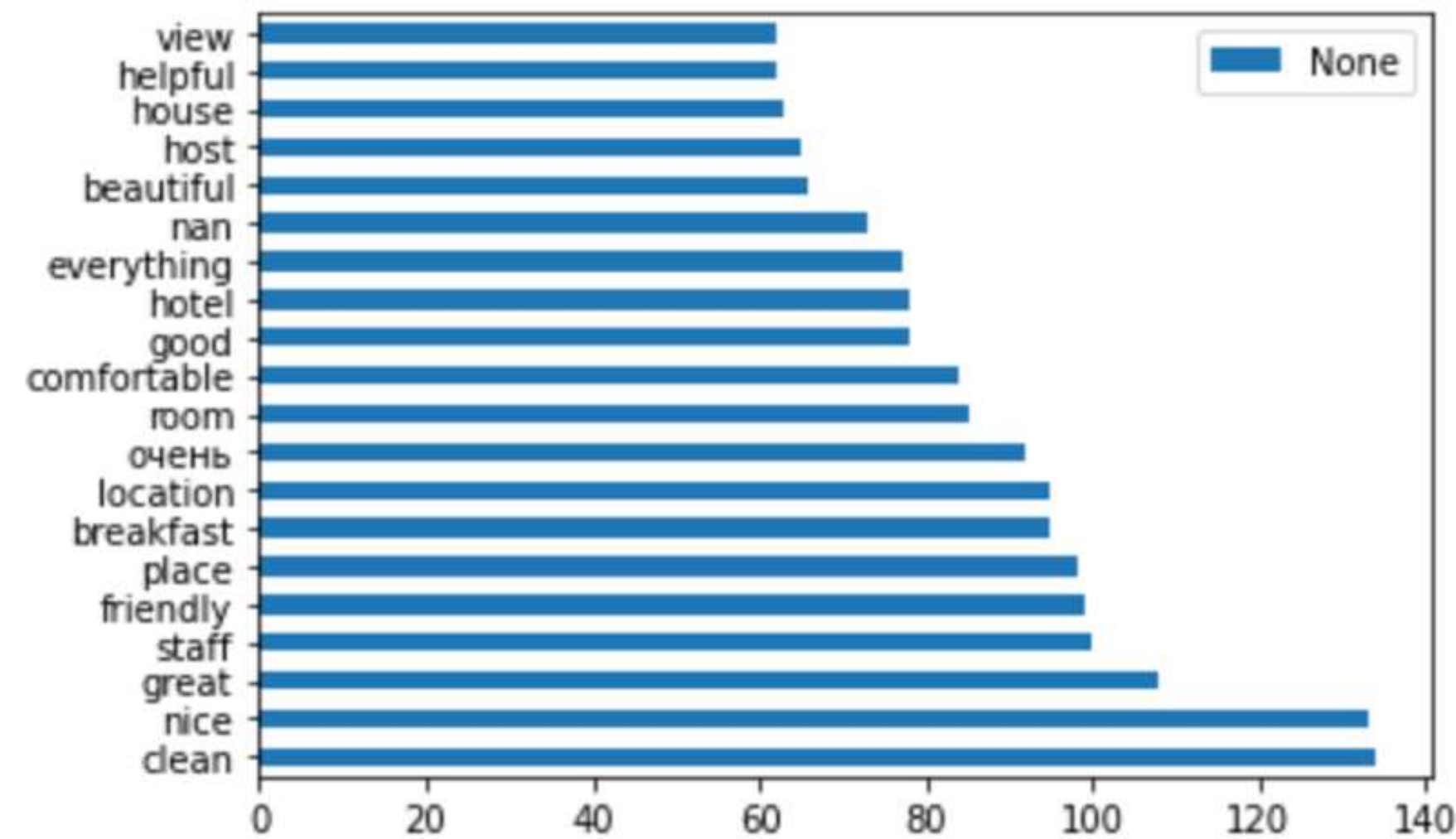
Current tourist perceptions* recognize Dilijan as a nature-centric gateway, rather than a destination where one can immerse and internalize a relatable lifestyle experience.

Sub-theme: fully functioning **cultural symbols** that reinforce lifestyle patterns are missing today. These could effectively invest in destination building.

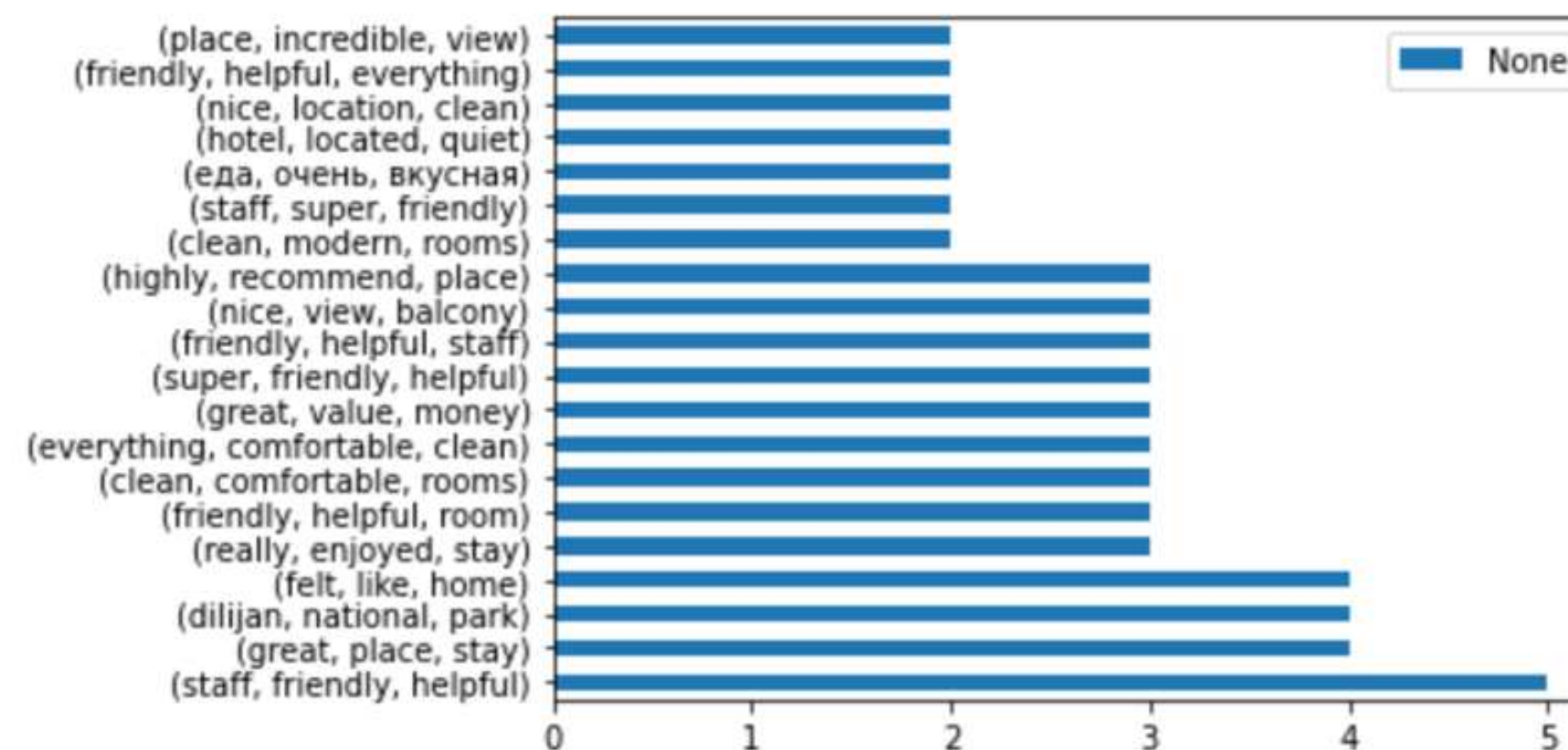
Top 20 most frequent trigrams in reviews

**Based on Data scrapping from online travel guides and review websites, reinforced by expert opinions*

TOP 20 MOST FREQUENT WORDS/ BIGRAMS/TRIGRAMS IN REVIEWS



- Some of the most frequent words to describe properties in Dilijan have been “clean”, “nice” and “great”, which were named 134, 133 and 108 times respectively.
- As can be seen in the graphs, the most repeated Bigrams are “friendly helpful”, “friendly staff”, “clean comfortable”, “great location” and “great place”
- Although the Trigrams have a lower frequency, they also show the feeling that can be seen in the Bigrams, since the most repeated words are “staff friendly helpful”, “great place stay” or “felt like home”
- Customer feedback highlights positive sentiments regarding the quality of service and the environment. The staff’s friendliness, helpfulness, and the convenient location are key aspects of the experience, suggesting that customers feel welcomed and comfortable, which reinforces the overall positive atmosphere. Anything specific to Dilijan is missing.



USUALLY, LIFESTYLE IS SUPPORTED
BY INFRASTRUCTURE
(CAFÉS, BOUTIQUES, CONCEPTS, CULTURAL HUBS).
THAT'S ONE OF THE WEAKEST POINTS IN DILIJAN.

PAST

Composer's Union Resort =
Concerts, Meetings,
Creative process on spot =
**Image of Cultural/
Musical Dilijan**

PRESENT

Union non functioning as it
used to = memories, that
no longer have substance
= degrading infrastructure/
home base.

APPENDIX #5

DILIJAN: INSIGHTS

SEMANTIC ANALYSIS

DILI-JAN

JAN in the name has positive connotation reinforced by the established rhetorics of Jan as a friendly and warm way of social interaction in Armenia.

humanness

openness

pleasurable

expectation

DILIJAN is HYBRID



serene

&



crowded

DILIJAN is
HYBRID



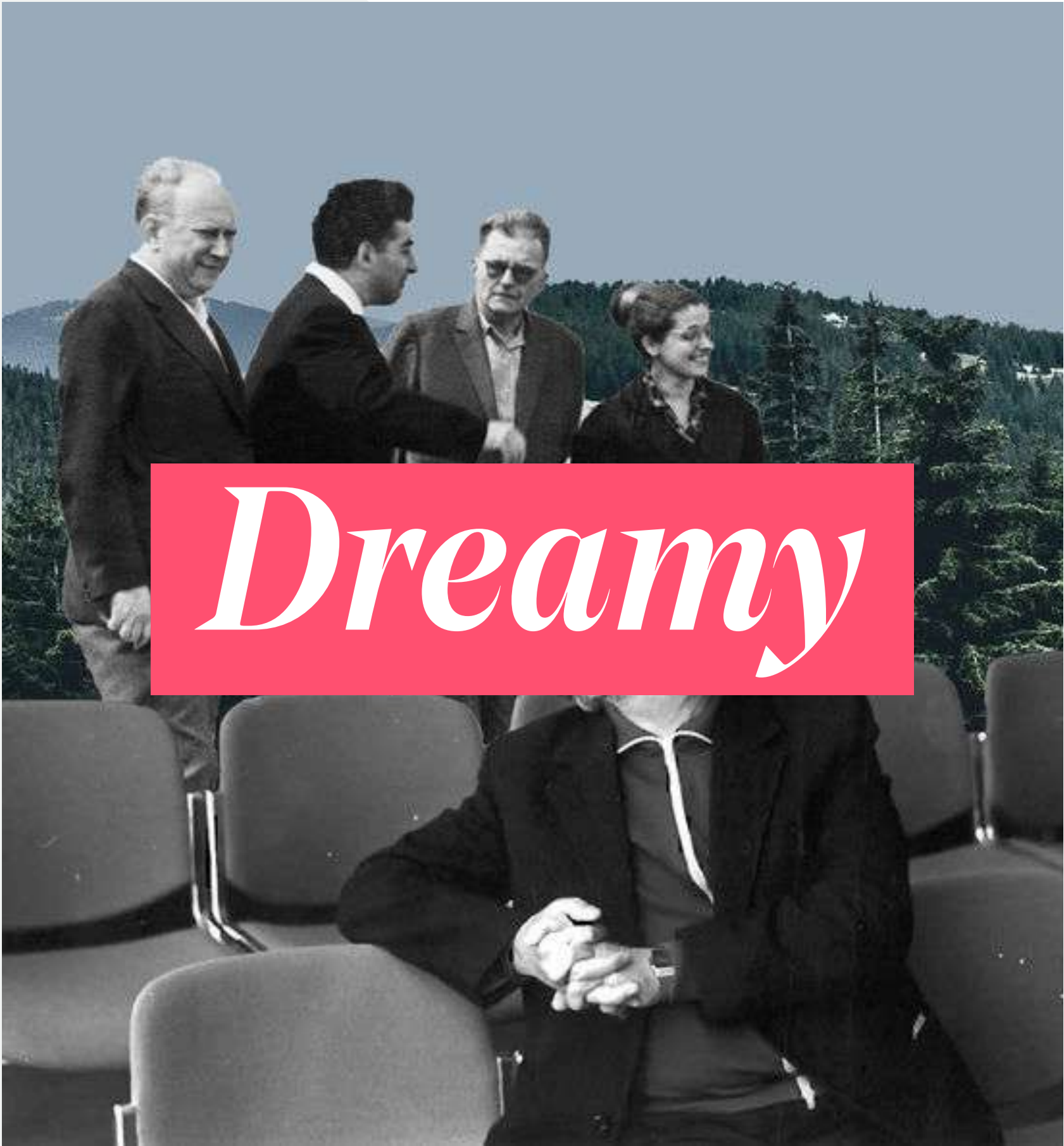
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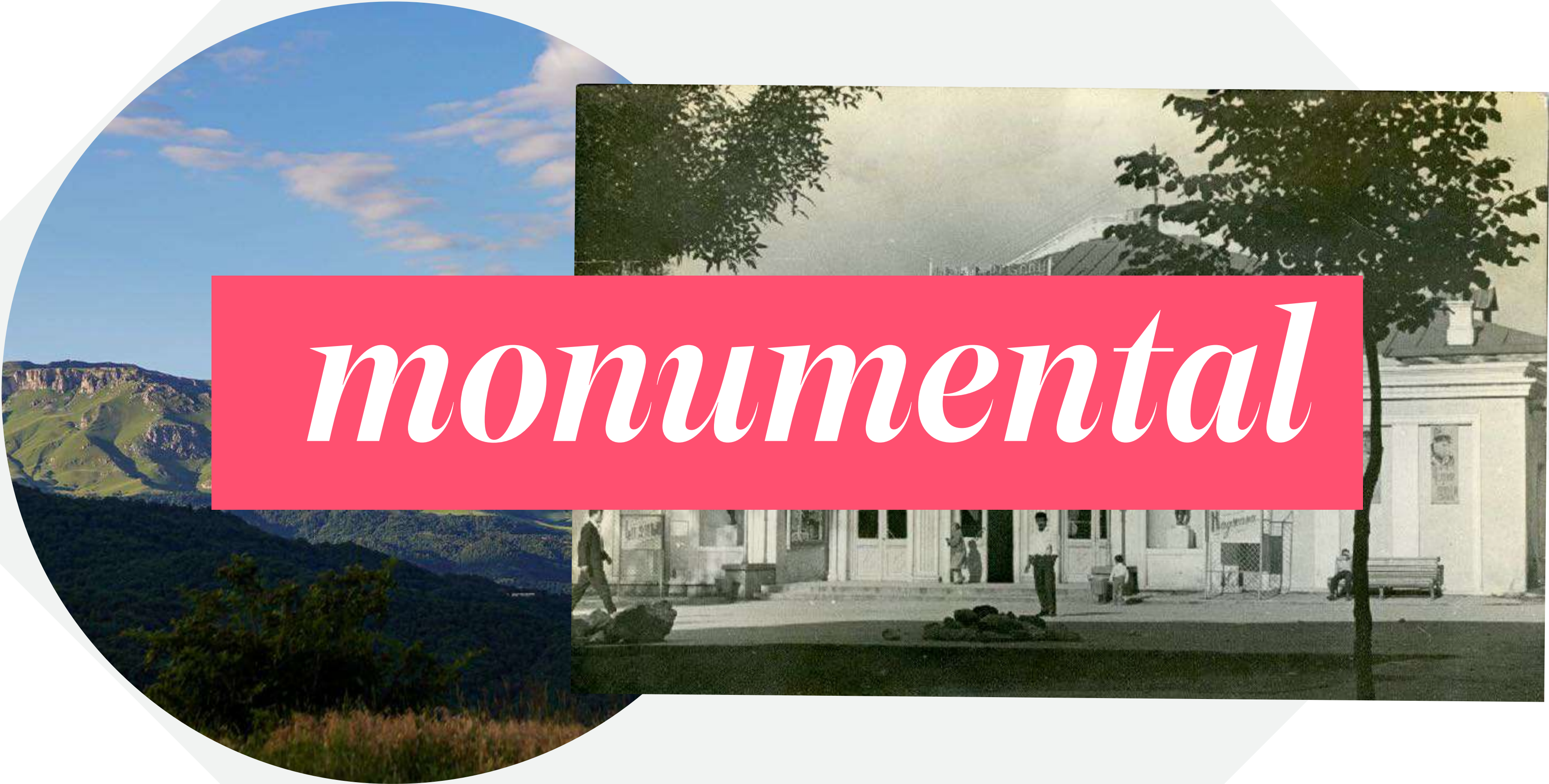
DILIJAN is
HYBRID



&



DILIJAN is HYBRID



DILIJAN is HYBRID



slow



this merger results in the

EXPERIENCE *of* WHOLENESS



EXPERIENCE *of* WHOLENESS

BE ONE WITH NATURE
GET WELL THROUGH NATURE

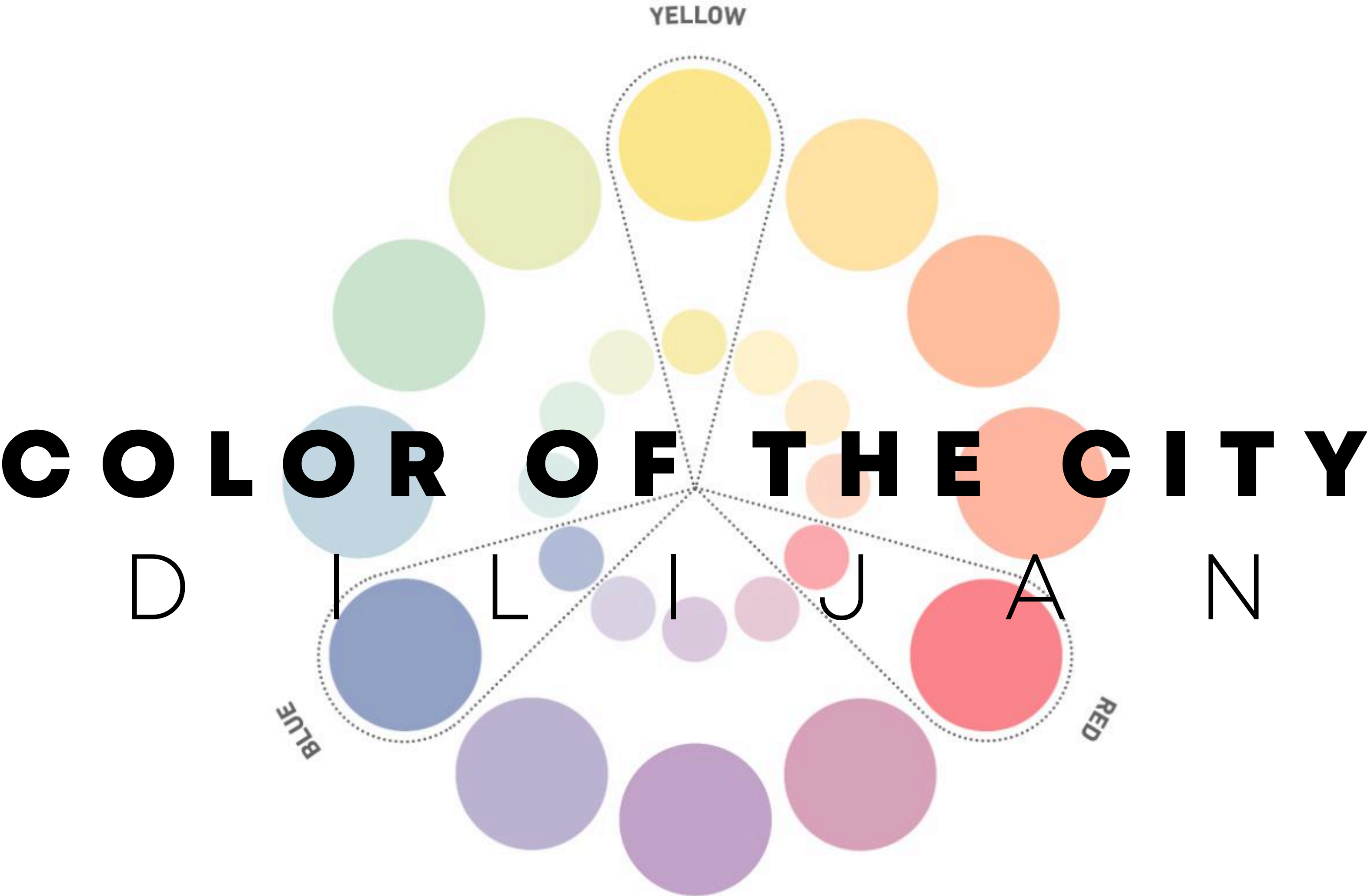
WHOLENESS = WELLNESS



VISUAL/SYMBOLIC ATTRACTORS TO SYMBOLIZE THE WHOLENESS EXPERIENCE

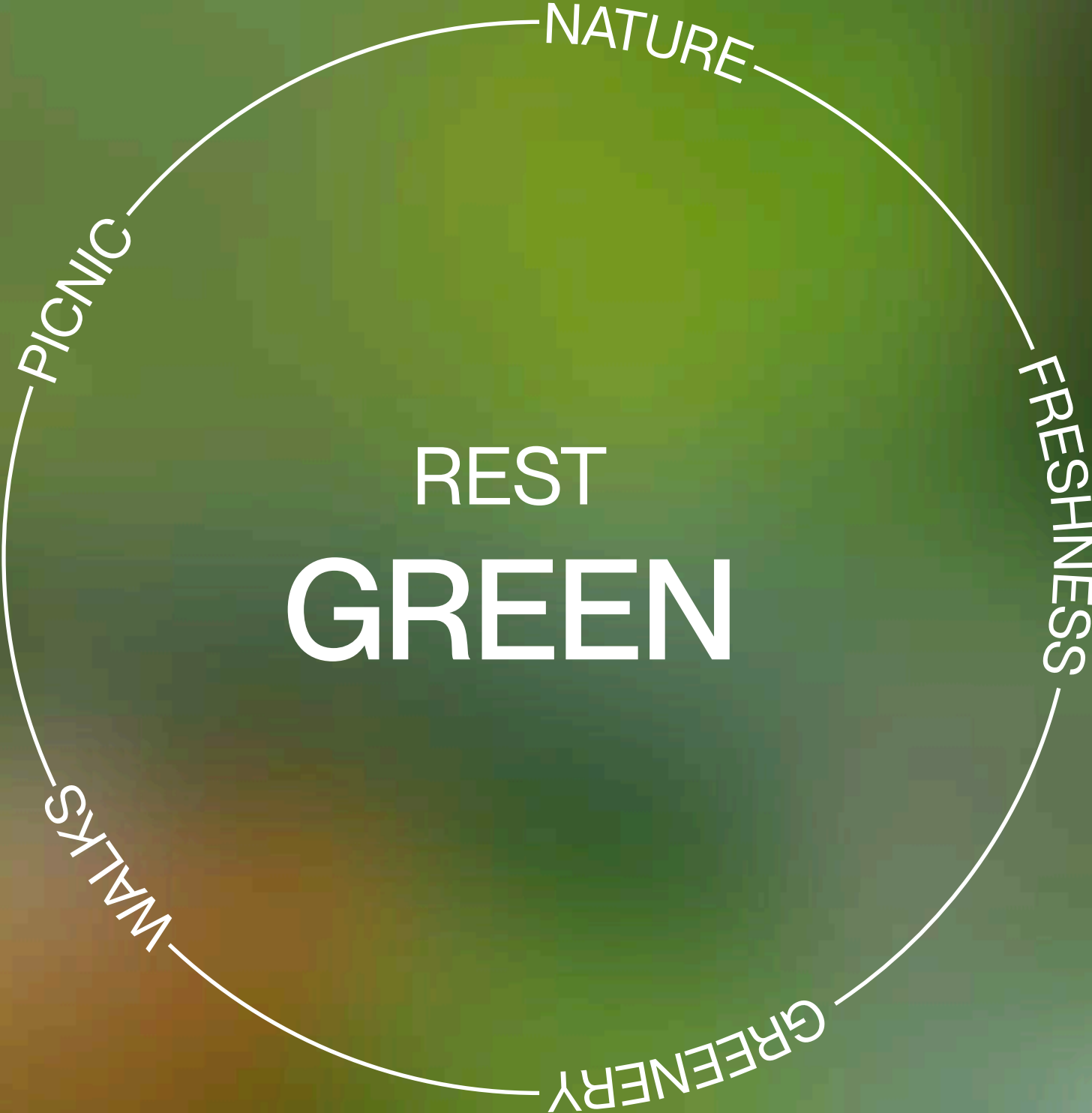
We conducted color of the city observation method, which was later reinforced by Anthropological research insights and community interviews.

This is a common research technique while delving into the sense of place.





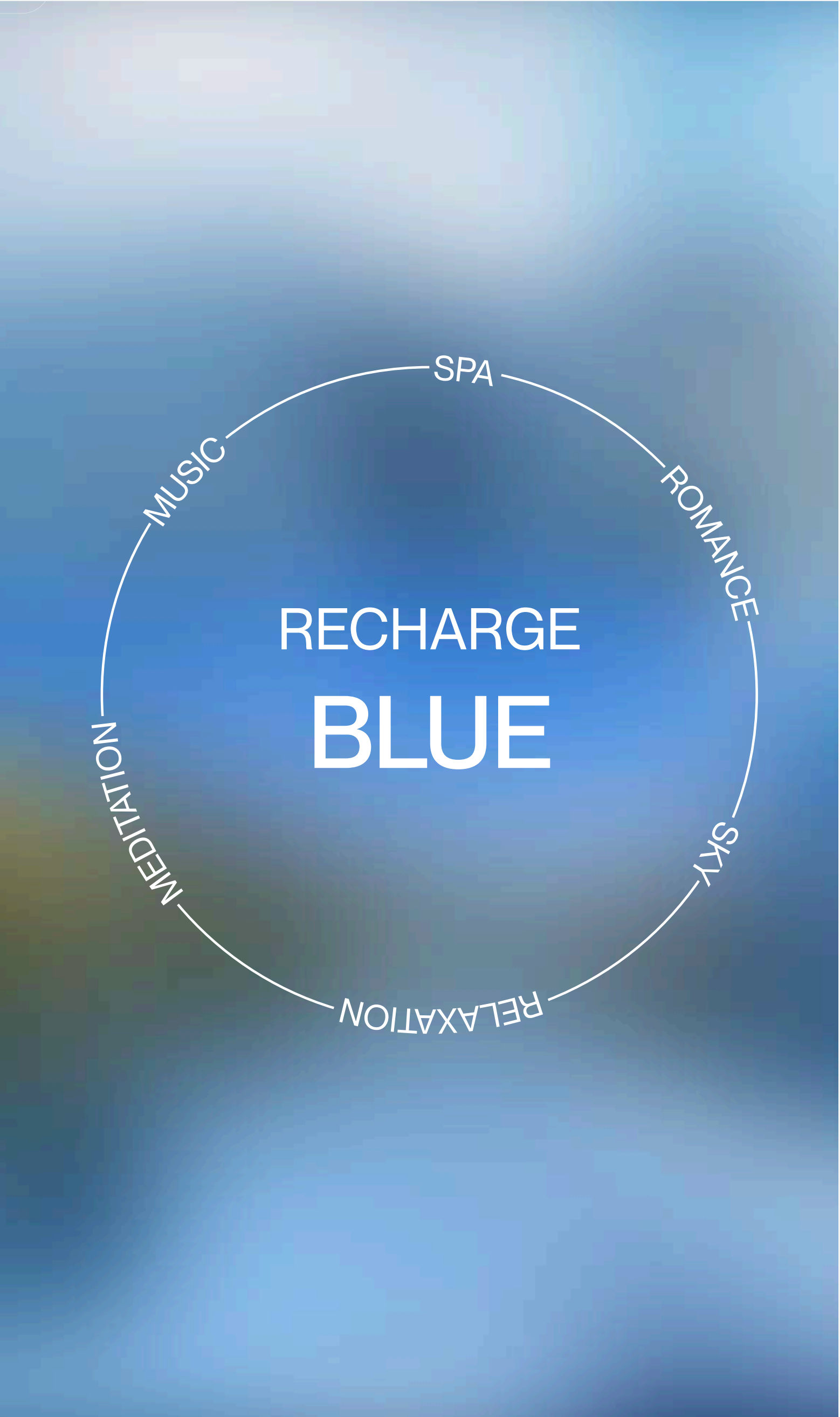




IN THE INTERSECTION OF TRANQUIL

SILENT, HARMONIC ESSENCE



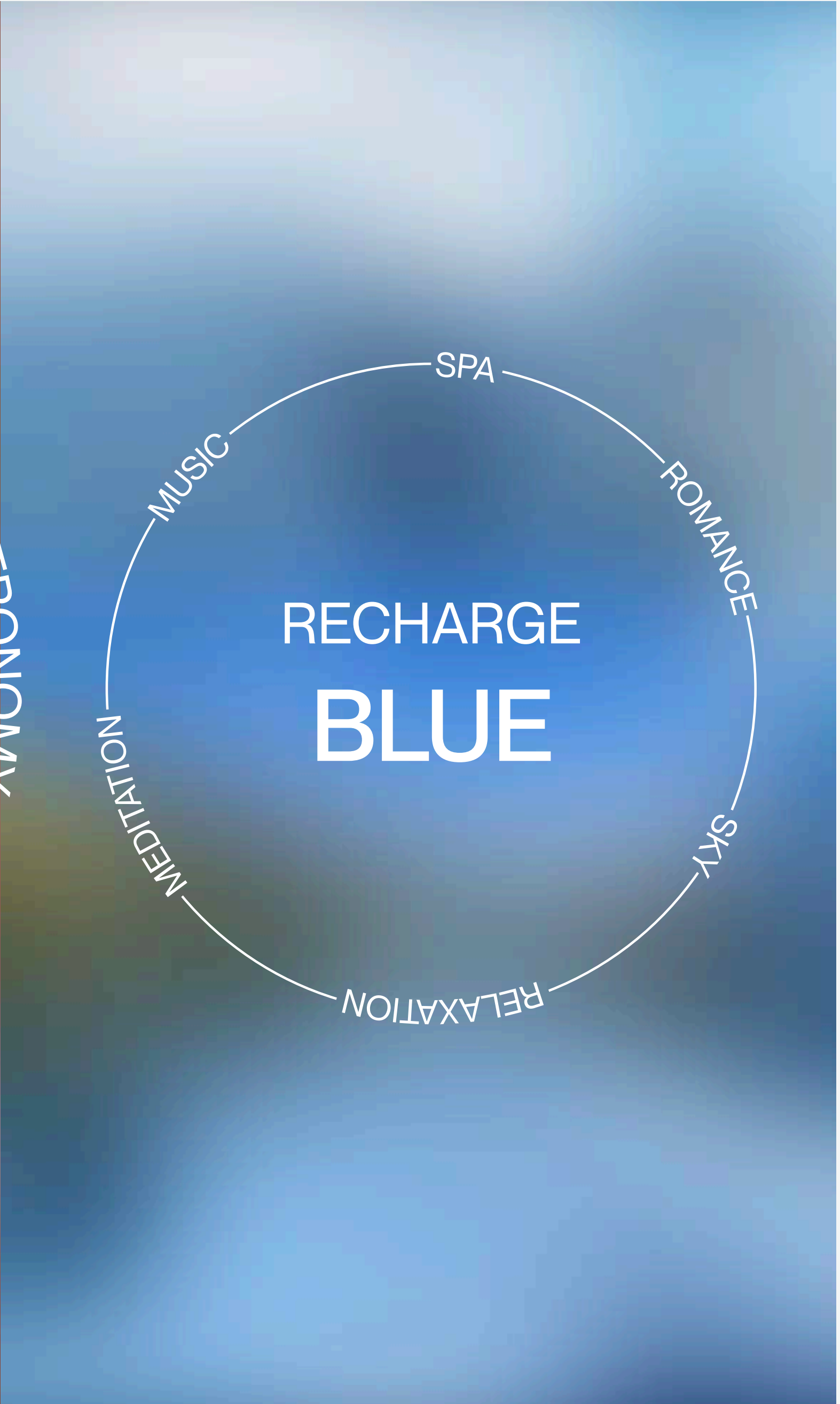




REST
GREEN

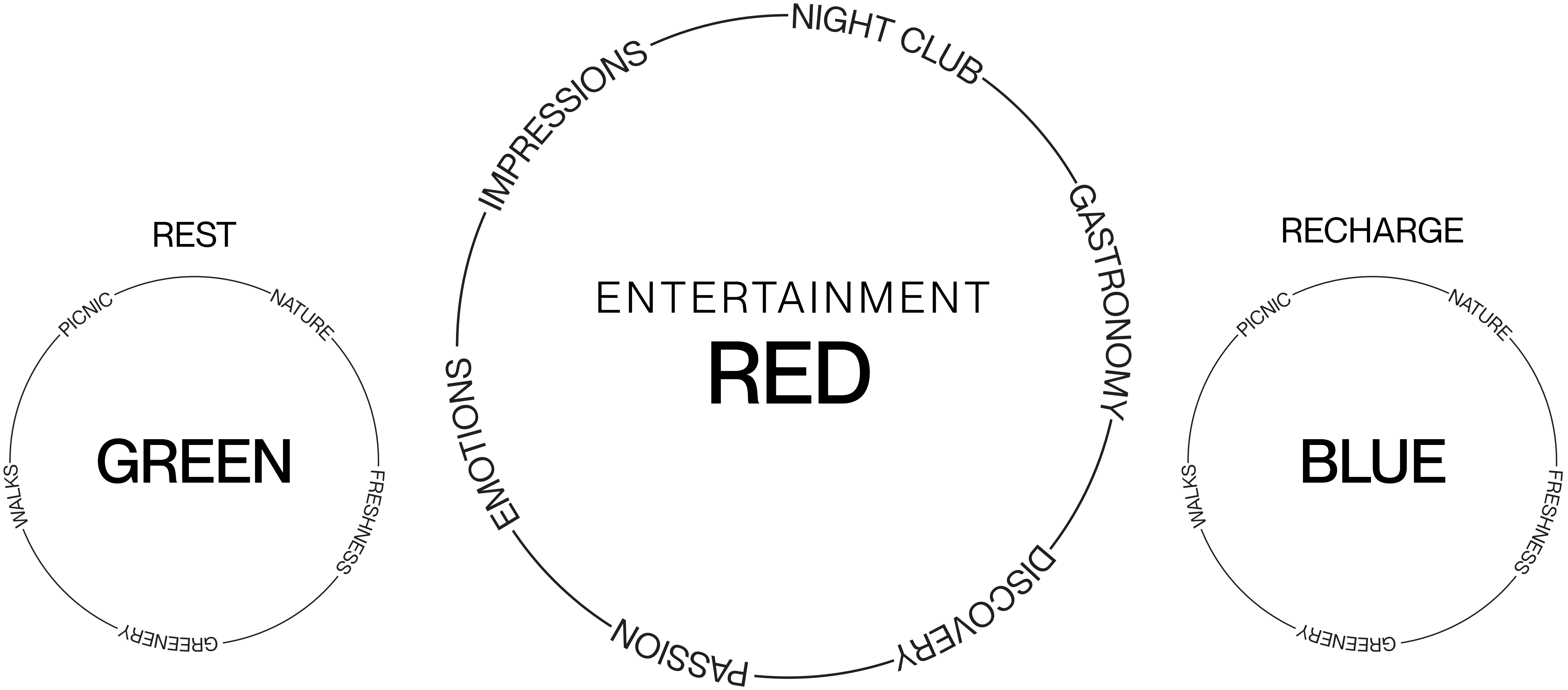


ENTERTAINMENT
RED



RECHARGE
BLUE





According to Anthropological research,
typical colors for Dilijan are perceived to
be:
Red, Green, *sometimes* BLUE

ТИПИЧНЫЕ ЦВЕТА ДИЛИЖАНА

Согласно антропологическим исследованиям, такими цветами являются **красный** и **зеленый**, иногда **голубой**. Это следует учитывать при проектировании парка.



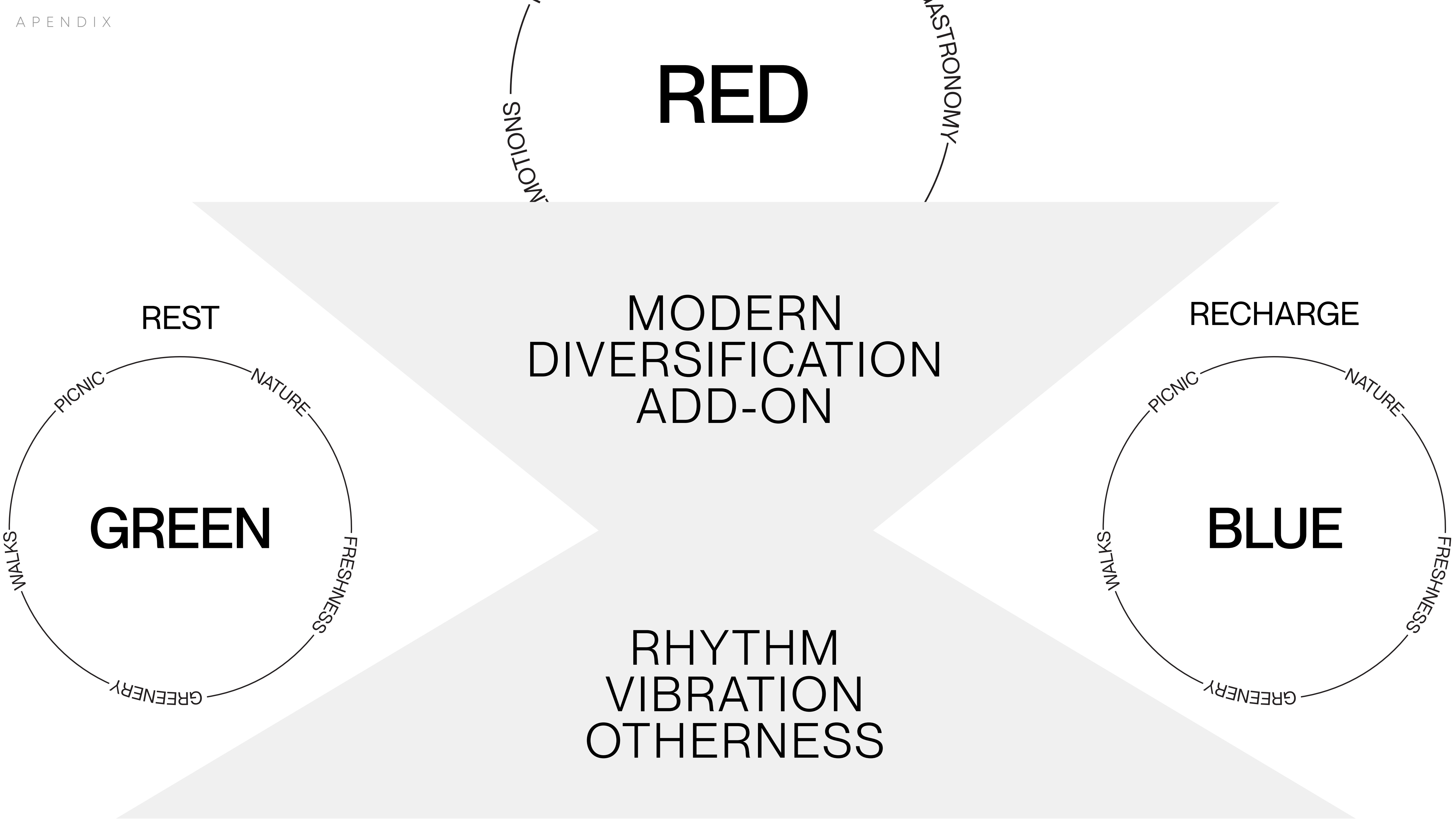
Да, удивительно красиво. Кажется, что горы обняли и охраняют долину с любовью и нежностью живых существ. На высоте 1500 метров воздух необыкновенно прозрачен и как будто окрашен в голубой мягко сияющий тон. Мягкость — преобладающее впечатление долины. Глубокое русло её наполнено пышной зеленью садов, и дома как бы тихо плывут в зеленых волнах по направлению к озеру Гокче. Южное Закавказье ошеломляет разнообразием и богатством своих красот, эта долина — одна из красивейших в нём...
— Максим Горький «По Союзу Советов»

"Dilijan is a **green-red city** - the color of a green forest, which here and there interferes with red tiled roofs of the houses"

-Vanush Sharambeyan

"For me, Dilijan is **a combination of three colored stripes**: blue (the sky of Dilijan is especially blue), green - the color of the forest in which the city is buried, and red roofs."

-Artak, stone carver



GREEN.RED.BLUE

3-COLOR OF DILIJAN

By synergising the themes of green (forest&garden:naturalistic), blue (water&sky: tranquility) & red (passion&man-made heritage), we are creating a place that is on one hand keeping with its natural environment, on the other offering liveable & lovable modern lifestyles for its residents & visitors.

3-COLOR-EXPERIENCE POSITIONING REPRESENTS DILIJAN’S EXISTING CONTRAST IN A NEW WAY

The recognizable architectural appeal of Dilijan is a **PLAY OF CONTRASTS:**
a combination of massive, hard, monolithic stone and patterned, thin, light carved wood.

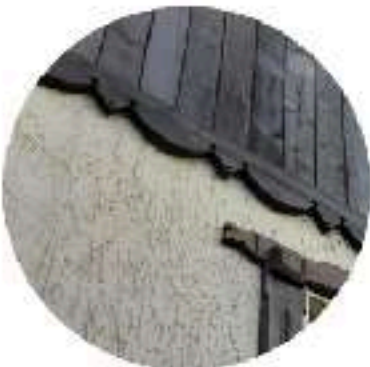
Дилижанский стиль

Красная черепица



Крыши в Дилижане фирменного рыже-красного оттенка — из-за цвета черепицы "Марсель"

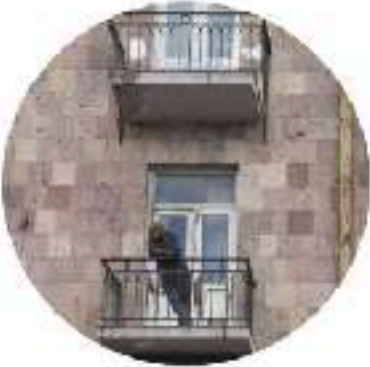
Побелка и штукатурка



Беленые стены — наследие архитектурного стиля молочан

Советское прошлое

Армянский туф



Армянский туф теплых оттенков характерен в целом для Армении

Общей чертой материалов и фактур Дилижана можно назвать тактильность, природность и системность использования. Город старается проявлять собственную идентичность, формируя дилижанский стиль (без оглядки на советское прошлое)

Дерево



Фирменные резные балконы и декор домов деревянной резьбой стали основой дилижанского стиля

Камень



Для Дилижана характерно использование природного камня. Речной камень сложно обработать, поэтому кладка хаотичная, из камней неправильной формы. Цвета натуральные, серый, песочный, с включением камней голубых оттенков.

Бетон



Общественные здания советского периода строили с использованием бетона

Дилижанский стиль основан на игре контрастов, сочетании массивного, твердого, монолитного камня и ажурного, тонкого, легкого резного дерева. Сочетание контрастных фактур дерева и камня делает узнаваемым архитектурный облик города.

3 levels of D:Experience

1st

BLUE IS MYSTERY: Feeling more, wandering, inspiring, creating, writing, sensory exploration of self and the environment.

2nd

GREEN is REFUGE: Exit the main flow of activities, the noise, the most people, rejuvenate, unwind, heal.

3rd

RED is SOCIAL: Meeting new people, spends time with others, dine, eat, chill, fun, entertain...

Thank you