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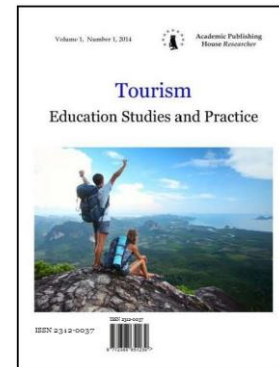
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Articles and Statements

Analysis of Tourism Potential and Transport Infrastructure of Khorezm Region, Uzbekistan

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Abstract

The following paper attempts to analyze statistical data regarding tourism industry in Khorezm region, Uzbekistan based on statistical database provided by regional committee of statistics of Khorezm region. The study also attempts to reveal the existing issues in transport provision by investigating the results of Uzbekistan *International Visitor Economy Survey* conducted by UNWTO in 2014. The main conclusion is that to increase the number of visitors adequate tourism infrastructure should be provided in the region. The findings of the paper provide useful information for destination planners of the region.

Keywords: tourism, infrastructure, air transport, railway transport, public transportation.

1. Introduction

Tourism has become a strategic sector of economy as a wide range of reforms has been carried out in this field starting from simplification of visa procedures and ending with efforts to increase the quality of service in accommodation, transportation and restaurants.

After opening up the country to the world by simplifying the visa formalities, the number of tourists who visited the country in 2017 exceeded 2,52 million and increased by 24,3 % in comparison with 2016, while the export of tourist services went up by 24 percent compared with 2016 reaching 1 billion 557 million US dollars ([Committee on development of tourism, Uzbekistan, 2018](#)).

It's forecasted that as a result of new reforms in tourism industry to develop tourism infrastructure, the figures are to soar significantly.

It is undeniable fact that Uzbekistan is becoming a popular tourist destination due to the fact that in this country a large number of world-famous architectural monuments are situated in cities such as Khiva, Bukhara and Samarkand which were the main stops along the Great Silk Road.

Khiva is the only fully preserved ancient city on the Great Silk Road. By the number of historical and architectural monuments preserved in its original form, it occupies one of the leading places not only in Uzbekistan, but also in the world.

Tourism in Khiva, specifically in Khorezm region has become an integral part of the regional economy.

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However, minimal information exists on tourism potential of Khorezm region and there is a significant gap in literature regarding the transport infrastructure of Khorezm region which is one of the integral elements of tourist product.

The paper aims to analyze the current condition of tourism industry and available transportation infrastructure for tourism in Khorezm region. The author also attempts to reveal existing issues in provision of transport services to tourists by investigating the results of Uzbekistan *International Visitor Economy Survey* conducted by UNWTO in 2014 where 281 respondents were found eligible for analysis. Furthermore, research efforts may provide valuable knowledge to policy makers in transportation planning and destination management.

2. Discussion

Tourism in Khorezm region

Khorezm region is situated in the north-western part of the territory of the Republic of Uzbekistan. The territory of Khorezm region occupies 1.4% of the total area of the Republic of Uzbekistan, which is equal to 6.1 thousand km². The administrative center of the region is the city of Urgench (Main indicators..., 2017).

As of the beginning of 2018, the population of the region is 1,815 mln people, of which the prevailing number is rural residents (66.7 %), and the rest (33.3 %) are urban (The regional committee of statistics of Khorezm region, 2018).

Khorezm Region is divided into 10 administrative districts. The capital is Urgench (pop. est 135,000). Other major towns include Xonqa, Khiva, Shovot, and Pitnak.

The climate is a typically arid continental climate, with cold winters and extremely hot, dry summers.

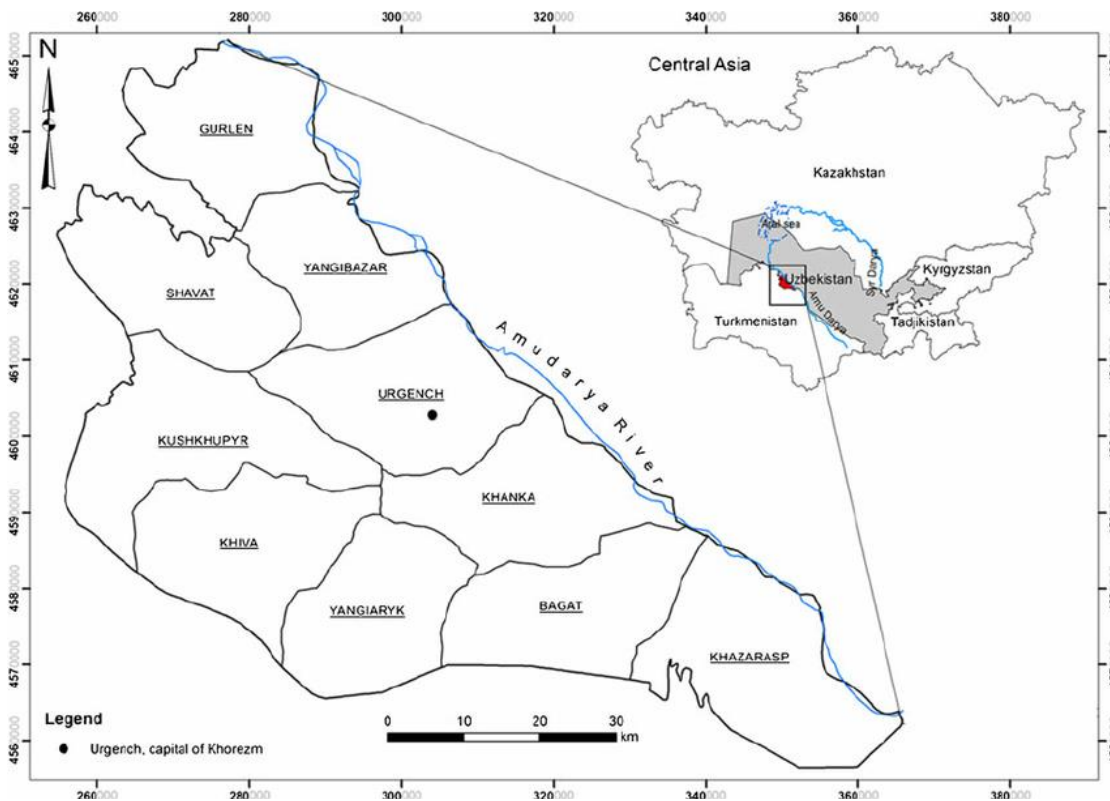


Fig. 1. The geographical map of Khorezm region

The city of Khiva stands out among other cities of the country with its rich cultural heritage. The fortress of Ichan-Kala was enlisted on the UNESCO World Heritage List.

Table 1. The number of visitors to Khorezm region between 2013-2016

No	Years	Europe	Asian countries	CIS countries	America	Africa	Foreign visitors	Local tourists	Overall number of visitors
1	2013	41 980	7510	1731	1875	204	53300	20000	73300
2	2014	35102	7496	1942	1552	128	46200	21500	67700
3	2015	28094	7936	2669	1978	148	40825	22800	61625
4	2016	32314	9408	3049	1658	171	46600	29200	75800
Total		137490	32350	9391	7063	651	186925	93500	278425

Source: Statistical office of Khorezm region ([Main indicators..., 2017](#))

As it can be seen from the table above the tourism figures of Khorezm region witnessed a downfall in 2014 and 2015. In 2014, the number of visitors went down by 8 percent compared to previous year. Due to significant reforms in tourism industry in 2016, the situation changed and the numbers increased again. Foreign tourists expressed more interested in the destination than local tourists since they outnumber local visitors.

Table 2. The number of tourists who visited 'Ichan-Kala' fortress in Khiva city during 2013-2017

No	The name of the attraction	Types of tourists	2013	2014	2015	2016	2017
1	Ichan kala: the state museum-reserve	Total	728 665	735 004	737 801	741 614	905603
		Local	687 628	698 079	707 526	708 229	859416
		Foreign	41 037	36 925	30 275	33 385	46187

Source: Statistical office of Khorezm region ([Main indicators..., 2017](#))

Almost every tourist who paid a visit to Khorezm region came to see Ichan Kala fortress in Khiva. The interesting point is that the number of visitors grew rapidly in 2017 in comparison with earlier periods. The total number of visitors to Ichan Kala went up by 24 percent in 2017 compared to 2013.

Transportation infrastructure of Khorezm region

Transport infrastructure has come to have a rather confused role related to economic development, particularly regional development. There is a popular view that the provision of more and better infrastructure is not only a desirable instrument of regional development but is a sufficient instrument ([Masson, Petiot, 2009](#)).

Buses, taxis, and trolleybuses and mini buses the main transport means heavily used by local users and visitors. As its shown in the Table 1, the amount of passengers serviced by automobile transport is 85,4 mln, whereas electrified transport serviced only 0,1 mln passengers during the first three months of 2018.

Table 3. The number of passengers serviced and types of transport in Khorezm region

The number of passengers serviced and types of transport in Khorezm region 2018 January and March	
Passengers services, <i>in mlns.</i>	85,4
<i>From this:</i>	
Automobile transport	85,3
Electrified transport	0,1

Source: Statistical office of Khorezm region ([Main indicators..., 2017](#))

Many tourist companies offer transportation services for overseas visitors that include mini-buses, buses, car rental with drivers and car rental (self-drive).

This option is preferred by tourist since it provides most comfort during the trip to other regions of Uzbekistan.

Public transportation service in Khorezm region mainly provided by ISUZU buses, produced at Samarkand Automobile Plant are used by companies to carry commuters within the city and outskirts of the city. For shorter distance between towns you will find 11- to 14-seat Russian-made ‘Gazelle’ vans. For shorter suburban trips you’ll find cramped seven-seat “Damas” minivans.

Trolleybuses produced delivered by the Czech company Skoda operates mainly between the city of Urgench and Khiva. Urgench trolleybus system became the only one in operation in the country after the closure of Tashkent trolleybus system in 2010. The main purpose of keeping the trolleybus system was to make the public transport available for tourists.

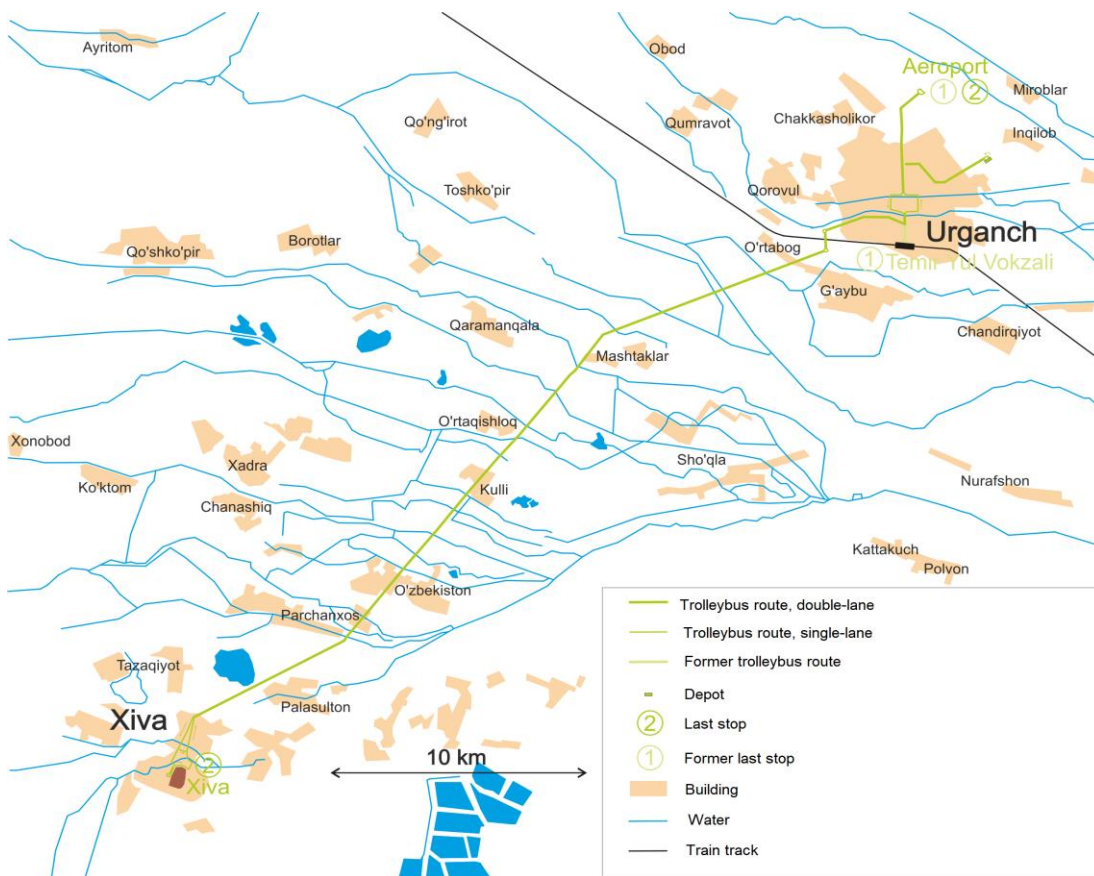


Fig. 2. The scheme of trolleybus routes of Urgench-Khiva
Source: https://en.wikipedia.org/wiki/Trolleybuses_in_Urgench

The contribution of long-distance air transport to the growth of tourism has been well documented (Page, 1994). Air transport is widely used by foreign visitors to reach Uzbekistan and even to travel within the country.

From Urgench International Airport regular flights to Tashkent and also to several cities of Russian Federation together with charter flights to other European cities such as Rome and Paris during the tourist season are realized. In 2017, Urgench International Airport provided service to 282136 passengers, including 43848 foreign visitors.

Second mostly used transport to travel to different destinations in Uzbekistan is regional railway system.

Overall distance of railway line within Khorezm region is 128, 7 km. There is central railway station in Urgench that has reconstructed recently and capable of providing service to 500 passengers per hour. The central railway station is well-equipped with modern facilities to provide high quality service to passengers.

3. Methodology

A survey that consists of 29 questions was administered to overseas visitors in main tourist cities such as Tashkent, Samarkand, Bukhara, and Khiva by UNWTO in 2014. A total of two hundred and eighty one surveys were eligible for analysis.

The survey was designed using a range of question styles including multiple choice, open-ended questions and Likert scales. To be eligible, respondents must have stayed one night in the Republic of Uzbekistan and be a resident of a country other than Republic of Uzbekistan.

4. Analysis and results

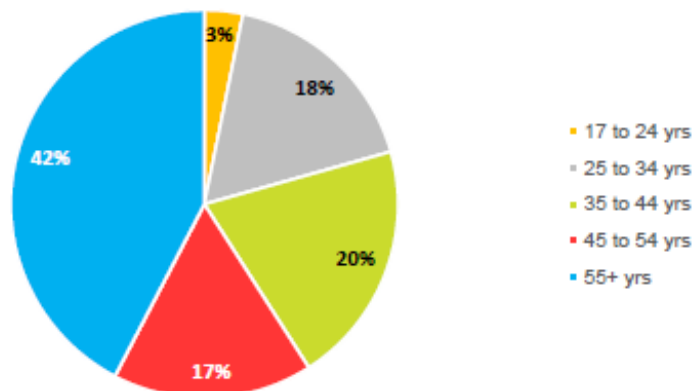


Fig. 3. Age of survey respondents

Source: Uzbekistan Visitor Economy Survey 2014(UNWTO)

Survey results show that the biggest group of visitors is people aged 55 and over. This explains the fact that most tourists visiting Uzbekistan are attracted by its culture and heritage that are interesting for older generation.

Style of travel	Respondents (%)
I prefer to go on a complete package holiday for a set period that I purchase before I leave home, with all accommodation and tours pre-booked.	28%
I prefer to go on a package holiday for a set time period that I purchase before I leave home, but I like to have some choice about where to stay and what tours to do.	24%
I like to travel independently, making all travel decisions myself, meeting and interacting with locals as much as possible, using a traveller's guidebook for reference, but preferring to stay in comfortable accommodation.	32%
I like to travel independently, making all travel decisions myself, totally involving myself in local culture, living as locals do, and mostly avoiding other travellers.	17%

Fig. 4. Age of survey respondents

Source: Uzbekistan Visitor Economy Survey 2014 (UNWTO)

Survey results reveal that most visitors (32 %) prefer to travel independently and they attempt to contact with local people, however they indicated that rely on traveler’s guidebook for information and also like to choose comfortable accommodation.

Another outstanding fact in this table is that half of the respondents’ travel behavior is totally opposite to those who prefer to plan their trip independently, thus they prefer to go on holiday based on package tours where most activities are planned ahead.

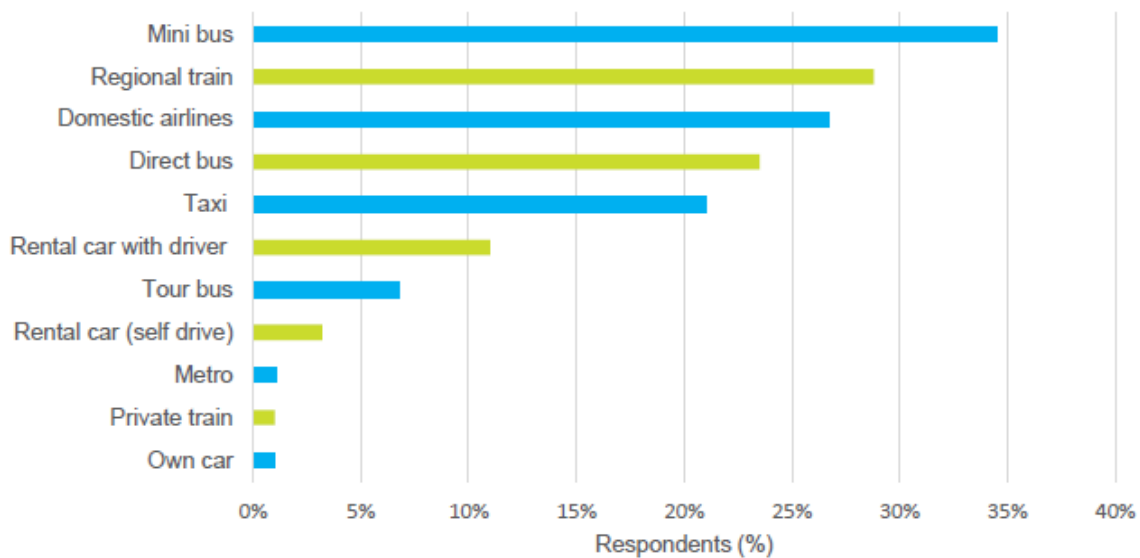


Fig. 5. Age of survey respondents

Source: Uzbekistan Visitor Economy Survey 2014

The most preferable mode of transport to travel in Uzbekistan among the visitors was mini buses. These minibuses are offered by local tour companies. Second mostly used mode of transport is regional train with 29 percent. Domestic airlines are also popular among visitors. The findings show that tourists prefer mini buses to other types of transport because most of them are modern and well-equipped and able to provide comfortable ride. Even though direct regional buses, trains are cheaper in price visitors avoid using them because most of the regional buses are unsafe and do not meet international standards. Due to lack of information provision in railway system visitors experience with this mode of transport can sometimes be stressful.

Online reservation system that exists in Uzbekistan Railways JSC (O‘zbekiston Temir Yo‘llari) can not be called tourist friendly. It mainly targeted at satisfying the needs of local residents.

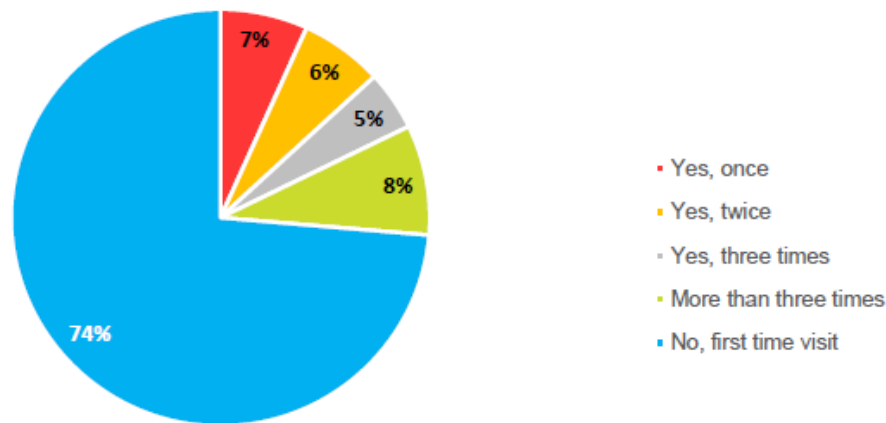


Fig. 6. Age of survey respondents

Source: Uzbekistan Visitor Economy Survey 2014(UNWTO)

It is also important to note is that majority tourists visiting Uzbekistan and Khorezm region specifically for the first time. This means much effort should be put in order to provide high quality service to visitors, so probability of re-visitation will be high in the future.

5. Conclusion

The findings show that overseas visitors were predominately older people aged 55 years and older who visited Uzbekistan for the first time. Most of them were travelling as part of a pre-purchased tour.

It is essential to note that majority of visitors indicated that they prefer flexibility when travelling within the Republic of Uzbekistan, whether this be as a packaged holiday or independently, however many tourists are seeking tourism products and experiences that provide a level of comfortability and familiarity.

Successful tourism development in Khorezm region requires more intensive investment in modernization of infrastructure. Since majority of foreign visitors motive to come to Khorezm region is to be familiar with culture and heritage. Taking in account the age group of visitors high quality service is a necessity for them to feel comfortable.

These findings provide useful information for destination management in developing further strategies to develop tourism sector in Khorezm region.

From the results of this paper, some aspects can be pointed out for further research. First, specific role of transportation system in Khorezm region in tourism development and also the influence of transportation system on overall destination satisfaction would be of great interest.

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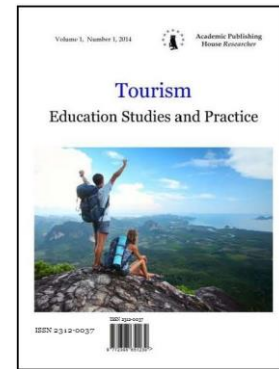
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Trends in the Development of Tourism in Region (Case Study of the Vologda Oblast)

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Abstract

Tourism is a sector which has a significant impact on territories' socio-economic development. This kind of economic activity is characterized by the multiplier effect due to the generating income determination in related industries. The target of research is the analysis of the dynamics of tourism development in the Vologda Oblast. The research is based on statistical data and reveals causes hampering its development. In conclusion the author suggests a set of measures to promote this industry in the region.

Keywords: Tourism, regional tourism, economy.

1. Введение

Туризм является одной из отраслей народного хозяйства, имеющей неоспоримую экономическую и социальную значимость в масштабах страны и отдельного региона. Это один из крупнейших секторов экономики, обеспечивший по итогам 2017 г. 10 % мирового валового внутреннего продукта и каждое 10-е рабочее место в мире ([Economic Impact of Travel & Tourism; UNWTO Annual Report](#)).

В Российской Федерации в последнее время сфера туризма претерпевает определенные трансформационные изменения, связанные с колебаниями курса рубля, неблагоприятными проявлениями экономического кризиса, а также действовавшими временными ограничениями въезда граждан РФ в курорты Турции и Египта. Это привело к сокращению числа зарубежных туристических поездок россиян и их вынужденной заменой отдыхом внутри страны.

По итогам 2016 года, вклад добавленной стоимости, созданной туризмом, в экономику страны составил 2604,7 млрд рублей или 3,4 % валового внутреннего продукта. При этом значение данного показателя с 2011 года увеличилось на 0,5 п.п. По прогнозам Ростуризма, к 2025 г. эти показатели должны вырасти до 5 трлн руб. и 5 % ВВП.

В настоящее время российская экономика нуждается в новых источниках экономического роста, способных выступить в качестве ее катализаторов. Поиску новых путей развития экономики страны посвящены труды многих отечественных исследователей, среди которых можно выделить работы ученых Института народнохозяйственного прогнозирования РАН ([Ивантер и др., 2018](#)), Вологодского научного центра РАН ([Ильин и др., 2014](#); [Ускова и др., 2013](#)), Института экономики РАН ([Сухарев, 2018](#)) и других организаций.

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Туризм, обладая мультипликативным эффектом, влияя на развитие смежных отраслей, вполне может рассматриваться в качестве такого катализатора.

В связи с этим изучение изменений, происходящих в отрасли, видится актуальным с целью выявления общих закономерностей и реакции данной сферы экономической деятельности на различные факторы внешней и внутренней среды. Кроме того, определение состояния и тенденций функционирования сферы туризма способствует выработке эффективных управленческих решений как на кратко-, так и на долгосрочную перспективу.

2. Материалы и методы

Информационную базу исследования составили труды российских ученых, занимающихся вопросами развития сферы туризма на федеральном и региональном уровне. Среди них вопросы изучения влияния туризма на экономику отражены в работах Е.А. Джанджугазовой, Т.Н. Григоренко, Л.Н. Казьминой, В.И. Кружалина, К.В. Кружалина, Н.В. Шабалиной и других авторов (Джанджугазова, 2014; Григоренко и др., 2015; Кружалин и др., 2016). Однако в данных работах недостаточно подробно учтены тренды развития отрасли на региональном уровне.

В связи с несовершенством статистической информации в туристской отрасли РФ выявление тенденций развития туристского рынка в регионе будет основано на анализе официальной информации, характеризующей деятельность основных субъектов турбизнеса. Методологические подходы исследования базируются на общенаучных методах сравнения, обобщения, анализа, синтеза.

3. Обсуждение

В Российской Федерации в период с 2010 по 2017 годы число турпакетов, проданных россиянам на внутренние направления, выросло на 78 % при одновременном сокращении спроса на выездной туризм на 22 % (Таблица 1). Общее же количество проданных путевок за аналогичный период практически не изменилось.

Таблица 1. Основные показатели деятельности туристских фирм в Российской Федерации

Показатель	2010	2011	2012	2013	2014	2015	2016	2017	2017 к 2010 в %
Число реализованных населению турпакетов – всего, тыс.	4358	4427	4763	5384	4384	4024	3352	4390	101
из них гражданам России:									
по территории России	872	929	905	969	992	1331	1529	1552	178
по зарубежным странам	3367	3326	3738	4240	3253	2482	1625	2605	77

Источник: данные Росстата

С 2016 по 2017 год в 1,6 раза выросли продажи турфирм туров в зарубежные страны, что связано с открытием чартерных полетов в Турцию в 2016 году. Так, по данным Росстата, количество туристских поездок в эту страну за январь-декабрь 2017 увеличилось в 5,7 раза (!) по сравнению с прошлогодними показателями. Поэтому есть все основания полагать, что при возобновлении авиарейсов в египетские курорты, выездной туризм еще больше укрепит свои позиции.

Следует отметить, что развитие туризма в регионах Российской Федерации весьма дифференцировано, что связано с разным уровнем их туристского потенциала, потребительскими предпочтениями населения, а также влиянием экономических факторов.

Так, например, к явным лидерам туристического рынка страны следует отнести Краснодарский край с центром в г. Сочи, Республику Крым, а также города федерального значения – Москву и Санкт-Петербург. Эти территории наиболее посещаемы и востребованы туристами.

В последнее время в субъектах РФ активизировалась деятельность по созданию туристских кластеров в рамках реализации федеральной целевой программы «Развитие внутреннего и въездного туризма в Российской Федерации (2011-2018 гг.)».

В связи с этим представляет интерес исследование тенденций развития сферы туризма в регионах, не считающихся традиционно «туристическими». К таковым относится Вологодская область. В ней, как и практически во всех субъектах Северо-Западного федерального округа, отмечается высокая концентрация привлекательных для туристов историко-культурных и природных объектов*. В частности, в Кирилловском районе Вологодской области находится важнейший культурный объект, внесенный в список ЮНЕСКО – ансамбль Ферапонтова Белозерского монастыря с фресками работы иконописца конца XV – начала XVI веков Дионисия, а также расположен Дарвинский государственный природный заповедник и один из крупнейших национальных парков страны – «Русский Север» (Ускова и др., 2011).

Развитию туризма в регионе уделяется достаточно много внимания со стороны региональных органов власти. Активно сфера туризма в регионе стала развиваться с 1998 г., когда был дан старт началу федерального проекта «Великий Устюг-родина Деда Мороза». За 19 лет его реализации количество туристов в муниципалитет выросло в 92 два раза, достигнув 264,5 тыс. посетителей в 2017 году.

Помимо г. Великий Устюг, наиболее посещаемыми в регионе являются гг. Вологда и Череповец – крупные административные и деловые центры, а также Кирилловский и Вологодский районы, в которых сосредоточены основные достопримечательности и наиболее развита инфраструктура.

О количестве туристов, прибывающих в регион, вследствие отсутствия официальной методики их подсчета, можно судить лишь по данным, предоставляемым региональными органами власти. Согласно им, турпоток в регион ежегодно увеличивается (Рисунок 1). По итогам 2016 года данный показатель приблизился к 3 млн посетителей.

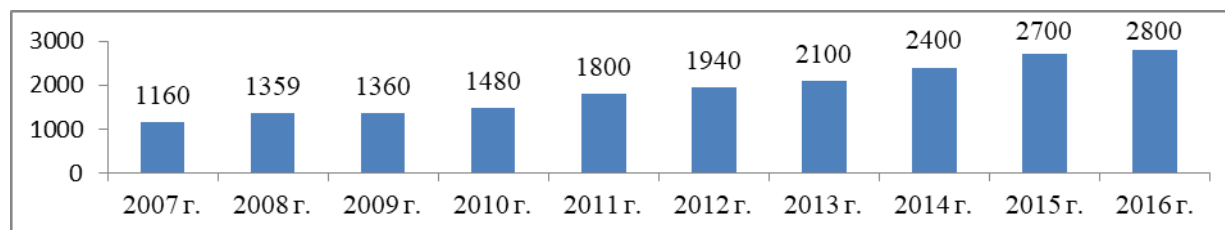


Рис. 1. Динамика туристского потока в Вологодской области, тыс. чел.

Источник: Данные Правительства Вологодской области

В регионе активно ведется работа по созданию туристских кластеров в рамках уже упоминавшейся федеральной целевой программы. В частности, в рамках Программы реализуются:

- туристско-рекреационный кластер «Северная Фиваида» (Кирилловский район);
- туристско-рекреационный кластер «Дед Мороз» (Великоустюгский район);
- туристско-рекреационный кластер «Вытегорье – корабельная сторона» (Вытегорский район);
- туристско-рекреационный кластер «Центральная городская набережная», г. Череповец;
- туристско-рекреационный кластер «Насон-город» (г. Вологда);

* СЗФО занимает 2-е место в РФ по числу объектов культурного наследия, и 1-е место в РФ по числу объектов, находящихся под охраной ЮНЕСКО.

– туристско-рекреационный кластер «Центр отдыха и туризма «У.Е.С» (Вологодский район).

В настоящее время туристические возможности региона используются не в полной мере, что подтверждается данными рейтинговых агентств. По данным РА «Эксперт», Вологодская область по состоянию в 2017 г. заняла 23-е место по туристическому потенциалу среди всех регионов РФ (наивысшая позиция в 2007 г. – 9-е место) (Рисунок 2).

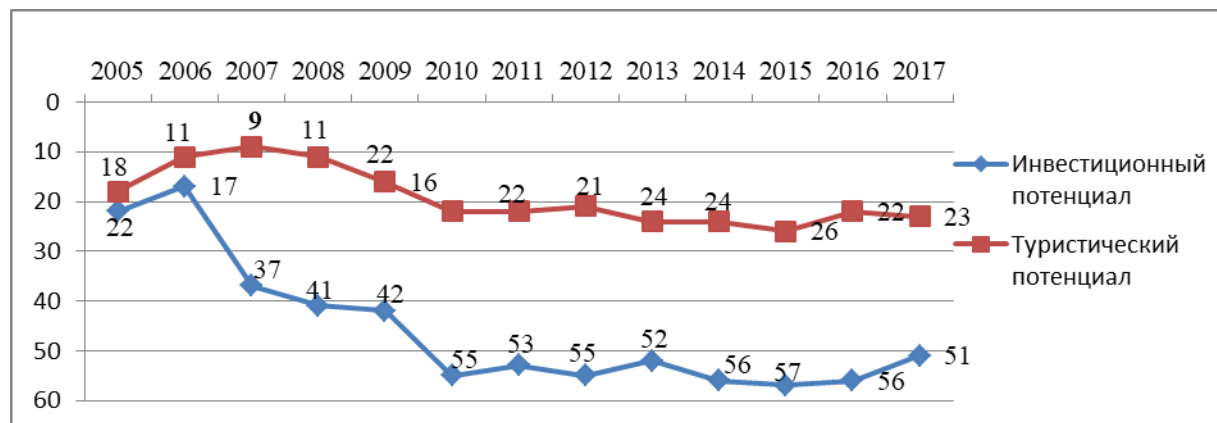


Рис. 2. Место Вологодской области по инвестиционному и туристическому потенциалу среди регионов России за 2005-2017 гг.
Источник: РА «Эксперт»

В национальном рейтинге туристических регионов, проводимым Центром информационных коммуникаций «Рейтинг» совместно с журналом «Отдых в России» с 2015 г., Вологодская область заняла 49-е место по итогам 2017 года, значительно ухудшив свое положение по сравнению с прошлогодним значением – падение составило 20 пунктов (Таблица 2).

Таблица 2. Рейтинг туристической привлекательности регионов РФ в 2017 г.

№	Субъект РФ	Общий балл
1	Краснодарский край	98,3
2	Город федерального значения Москва	96,8
3	Московская область	95,5
4	Республика Крым	95,2
5	Город федерального значения Санкт-Петербург	94,5
6	Ставропольский край	83,5
...
49	Вологодская область	54

Источник: составлено по данным ЦИК «Рейтинг». Режим доступа: <http://russia-rating.ru/info/10950.html>

Снижение позиций региона в данных рейтингах отчасти можно объяснить усилением позиций конкурентов.

Основным видом туризма на территории Вологодской области является культурно-познавательный туризм, предполагающий поездки туристов с целью ознакомления с памятниками культуры, природы, включающие посещение музеев, театров, осмотр достопримечательностей. Его доля в общей структуре видов туристской деятельности по данным региональных властей в течение 2008-2013 гг. практически не меняется и составляет около 70 % (Таблица 3).

Таблица 3. Статистика посещения Вологодской области в зависимости от целей (в %)

Цели посещения	2008 г.	2009 г.	2013 г.
культурно-познавательные	70,0	67,0	70,0
служебные	19,0	15,0	н/д
отдых в сельской местности	5,7	12,5	10,0
лечебно-оздоровительные	5,2	5,5	н/д

Источник: Данные Правительства Вологодской области

Таким образом, туристское предложение в регионе слабо диверсифицировано. Вместе с тем, потребности населения в разнообразном отдыхе достаточно велики.

Одним из участников туристического рынка региона являются турфирмы, предоставляющие услуги туристам по продаже тура или отдельных его составляющих. За период с 2010 по 2017 годы общее количество турфирм в области сократилось на 27 % (Таблица 4).

Таблица 4. Основные показатели деятельности туристских фирм Вологодской области в 2010-2017 гг.

Показатели	2010 г.	2011 г.	2012 г.	2013 г.	2014 г.	2015 г.	2016 г.	2017 г.	2017 к 2010 г в %
Число туристских организаций (турфирм), всего	159	141	147	132	145	91	103	116	73
Из них:									
-туроператоры	45	6	7	4	5	1	7	13	29
-турагенты	93	77	87	80	92	54	62	80	86,0
- туроператорская и турагентская деятельность	н/д	39	38	35	32	21	24	23	59
только экскурсионная деятельность	13	19	15	13	16	15	10	...	76,9
Число обслуженных туристов, чел. всего	76089	71227	95081	92928	81987	81186	66728	63397	83,3
отправлено граждан России: по территории России	40452	35157	46914	43020	38544	36822	52711	43282	107
Из них по Вологодской области	21934	16427	22358	26213	16535	10019	29287	23607	107,6

Источник: Туризм в Вологодской области: стат. сб. // Территориальный орган Федеральной службы государственной статистики по Вологодской области. Вологда, 2017

При это наиболее сильно заметно снижение числа туроператоров – спад составил порядка 70 %. Это общероссийская тенденция, связанная с банкротством организаций вследствие колебаний курса валют, сокращением чартерных программ, приведшим к снижению спроса россиян на поездки за рубеж*. Вместе с тем, стоит отметить, что с 2015 г. наблюдается тенденция роста как числа турфирм в целом, так и конкретно туроператоров, что говорит об адаптации участников туристского рынка к меняющимся внешним и внутренним условиям.

За рассматриваемый период отмечается небольшой рост числа граждан, купивших туры, как по России, так и по Вологодской области в частности (порядка 7% в обоих случаях). При этом за 2015-2017 годы прослеживается тенденция смещения предпочтений россиян, обслуженных турфирмами региона, выбравших поездки внутри страны и региона.

Эти данные позволяют говорить о растущем интересе путешественников к внутреннему туризму, особенно в условиях уже упоминавшихся внешних ограничений и экономической нестабильности.

При этом общее количество обслуженных туристов за 2010-2017 годы сократилось, составив в 2017 году 73% от уровня 2010 года.

Сектор предприятий размещения региона в 2017 г. представлен 266 коллективными средствами размещения (КСР), большую часть которых составляют гостиницы – 219 единиц (Таблица 5).

Таблица 5. Основные показатели коллективных средств размещения Вологодской области в 2010-2017 гг.

Основные показатели	2010	2011	2012	2013	2014	2015	2016	2017	2017 к 2007 гг., в %
Число коллективных средств размещения, ед.	129	123	112	105	96	112	210	266	206,2
Число гостиниц, ед.	101	92	84	79	72	88	175	219	216,8
Число номеров в КСР, ед.	4525	3923	3969	4003	3342	3494	5009	5729	126,6
Число мест в КСР, ед.	11348	12408	10032	9166	8709	8336	11985	13872	122,2

Источник: Туризм в Вологодской области: стат. сб. // Территориальный орган Федеральной службы государственной статистики по Вологодской области. Вологда, 2016.

Особенно активно он развивался в 2015-2017 гг. В 2 раза в регионе выросло число КСР, обеспеченный в основном увеличением количества гостиниц – в 2,5 раза. Значения этих показателей выше уровня 2010 года, что свидетельствует о динамичном развитии этого сектора.

Количество номеров в КСР и число мест в них относительно 2010 г. также возросло – на 10,7 % и 5,6 % соответственно. Рост показателей также существенным увеличением числа гостиниц в 2015-2017 гг.

Сфера предприятий общественного питания представлена в регионе в 2016 г. 667 организациями (Таблица 6). При этом их количество, а также число объектов за период с 2010-2016 гг. увеличилось на 27,8 и 19,8 % соответственно, что говорит о динамичном развитии данной сферы.

* По данным Росстата, количество туроператоров за 2010-2017 гг.. сократилось почти на 40 %.

Таблица 6. Характеристика сферы общественного питания в Вологодской области

Показатель	2010	2011	2012	2013	2014	2015	2016	2016 к 2010 гг., в %
Число организаций общественного питания, ед.	522	528	552	596	631	637	667	127,8
Число объектов общественного питания, ед.	926	915	913	938	989	1021	1109	119,8
Число мест в объектах общественного питания, ед.	40801	40779	45081	46272	49107	505652	53383	130,8

Источник: Туризм в Вологодской области: стат. сб. // Территориальный орган Федеральной службы государственной статистики по Вологодской области. Вологда, 2015

Проведенный анализ развития сферы туризма на примере Вологодской области позволил выявить следующие тенденции развития данной сферы в регионе:

- сокращение числа туроператоров как проявление общероссийской тенденции;
- динамичное развитие сектора размещения, особенно с 2015 по 2017 годы;
- переориентация туристов на внутренние направления в условиях ограничений экономического и политического характера;
- преобладание культурно-познавательного туризма в регионе;
- рост числа создаваемых туристских кластеров и туристского потока в регион.

4. Заключение

Таким образом, следует отметить, что сфера туризма Вологодской области активно развивается. Об этом свидетельствует положительная динамика показателей организаций сферы гостеприимства – коллективных средств размещения и предприятий общественного питания. Это говорит о высокой адаптации турбизнеса региона в условиях проявлений экономического кризиса. В связи с этим развитие данной сферы является перспективным видом экономической деятельности, способным приносить доход экономике региона даже

Ограничениями развития туристской отрасли региона является однотипное туристское предложение, ориентированное в основном на осмотр достопримечательностей региона туристами, а также слабый спрос населения на внутренний туристский продукт.

В связи с этим региональным органам власти целесообразно реализовывать ряд мер, направленных на стимулирование потребительской активности в отношении внутренних туров, в том числе за счет развития новых видов туризма, проведение мероприятий, активизирующих сбыт внутреннего турпродукта.

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Тенденции развития регионального туризма (на примере Вологодской области)

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Аннотация. Туризм является отраслью, которая оказывает значительное влияние на социально-экономическое развитие территорий. Данный вид народнохозяйственной деятельности характеризуется мультипликативным эффектом, генерируя образование доходов в смежных отраслях экономики. В 2014-2017 гг. на российском рынке туризма произошли изменения, обусловленные влиянием внешних и внутренних факторов. Исследование тенденций функционирования сферы туризма способствует выявлению причин, сдерживающих развитие туристского сектора. В качестве информационной базы исследования выступили теоретические и методологические работы российских ученых, а также официальные данные Росстата. Статья содержит анализ состояния туризма в регионе Северо-Западного федерального округа – Вологодской области, в ходе которого выявлены ограничения, сдерживающие его развитие. В заключение определены направления, способствующие активизации внутреннего туризма в регионе.

Ключевые слова: туризм, региональный туризм, экономика.

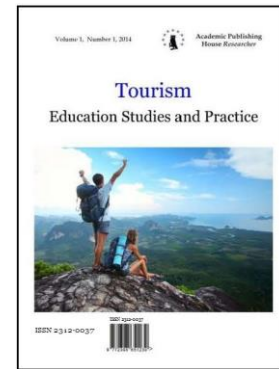
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Tourism Development Trends in Armenia

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Abstract

In recent years tourism develops rapidly in Armenia. The main tourism statistics, tourism competitiveness index are presented and analyzed in the article. The article discusses the main types of tourism that may be developed in Armenia such as religious, historical-cultural, spa-resort, eco- and agri-, sport and adventure, gastronomic, urban, educational, scientific, medical tourism. Although the growth of tourism in recent years, there are still many problems that hinder the promotion of tourism. The tourism statistics, marketing policy, legislation must be improved. Besides, the educational system must meet the requirements of the labor market. Tourist specialists must have all the skills for tourism industry development. Thus, the main problems are revealed and the trends and ways of tourism development are analyzed in the article.

Keywords: tourism, competitiveness, types of tourism, marketing, statistics, GDP, tourism development trends.

1. Introduction

Tourism is one of the largest industries all over the world and develops very fast. Year by year more and more people travel to visit friends and relatives, to have leisure time, or with the purpose of business travel, education, health recovery, etc. The number of international tourist arrivals reached 1,235 million in 2016. The total contribution of Travel & Tourism to GDP was USD 7,613.3 bn (10.2 % of GDP) in 2016 in the world. In 2016, the total contribution of Travel & Tourism to employment was 9.6 % of full employment (292,220,000 jobs). Visitor exports generated USD 1,401.5bn (6.6 % of total exports) in 2016. Travel & Tourism investment in 2016 was USD 806.5bn, or 4.4 % of total investment ([WTTC Travel & Tourism Economic Impact 2017 World](#)).

In Armenia also tourism develops fast in recent years.

The purpose of the paper is to analyze the main trends of tourism development in Armenia.

For the realization of the above mentioned purpose it is necessary to solve the following tasks:

- To analyze the statistics of the main indicators of tourism,
- To analyze the tourism competitiveness index,
- To analyze the main types of tourism in Armenia,
- To find out tourism and travel trends in recent years,

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- To analyze Armenian tourism development problems and make some suggestions for advancement.

The object of the research is tourism sphere in Armenia.

The subject of this research are the main trends of tourism development in Armenia.

Many methods are used during the research such as analysis and synthesis, micro and macro analysis, statistical analysis and graphical methods.

In the research a variety of data are used from the National Statistical Service of RA, World Tourism Organization, The World Travel & Tourism Council (WTTC) and other international organizations, etc.

2. Study area

According to UNWTO glossary “Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure” ([Understanding Tourism-Basic Glossary](#)).

In Armenia tourism was announced as the main sector of economy. The governmental policy objectives of tourism are determined by the law of the Republic of Armenia “About tourism and tourist activities” ([The law of the RA...](#)) and by the Tourism Development Plan. The purpose of the governmental policy in this sphere is to enhance touristic contributions in the national fund, balanced regional development, growth of living standards of population, as well as in the process of poverty reduction which may be conditioned by creating job opportunities, increasing the number of tourist visits and the income from tourism ([Tourism Development Plan ...](#)). In Armenia, the state administration body of tourism sphere is the State Tourism Committee of the Ministry of Economic Development and Investments, which is responsible for the development and implementation of the state policy in the sphere.

In 2017 1,494,779 tourists visited Armenia ([Social-Economic Situation of the RA, 2017](#)), which is 18.7 % more than last year ([Figure 1](#)). In 2017 the number of domestic tourists in Armenia counted to be 1,086,707 ([Social-Economic Situation of the RA in January, 2018](#)).

In Armenia the direct contribution of Travel & Tourism to GDP was USD 0.4bn, 3.8 % of total GDP in 2016, and the total contribution was USD 1.5 bn, 14.0 % of GDP in 2016. In 2016 Travel & Tourism directly supported 38,500 jobs (3.3 % of total employment), and the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 12.5 % of total employment (143,500 jobs). Visitor exports generated USD 918.4 mn, 28.0 % of total exports in 2016. Travel & Tourism investment in 2016 was USD 0.1bn, 4.4 % of total investment ([WTTC Travel & Tourism Economic Impact 2017 Armenia](#)).

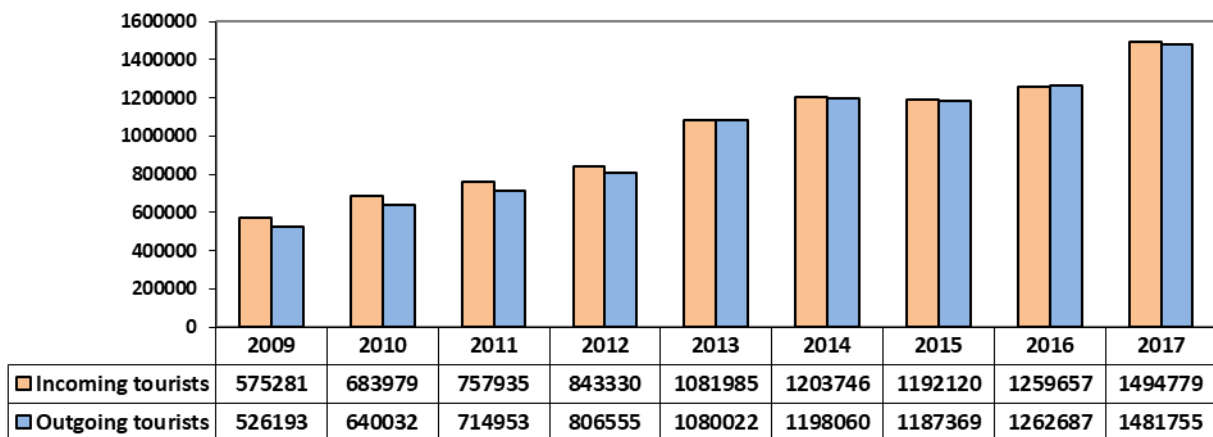


Fig. 1. Incoming and outgoing tourists of the Republic of Armenia, 2009-2017 ([Social-Economic Situation of the RA, 2010-2018](#))

If we look at the change in the number of arriving tourists in Armenia (Figure 2), it becomes clear that in 2010, compared to the previous year the increase was 18.9 %, in 2013 was 28.2 % and in 2017 was 18.7 %, then a sharp decline was in 2015 (1 % less than the previous year, which is mainly explained by the drop in tourists' flow from Russia).

It should also be mentioned that the data about the total number of incoming and outgoing tourists is based on the information of the number of arrivals and departures from Armenia recorded at the border crossing points of the RA, as well as on the results of the "Research of Visits and Departures" conducted in 2013. During the research, 22100 people participated in the survey and based on that coefficients the number of tourists was calculated in next years. It is natural that the results will not be so accurate. In this regard, we think that the problem may be solved in the following simple way: through a computer program, the worker at the border crossing points may fix the citizenship, gender, age of tourists based on their passport and ask shortly about the purpose and duration of their visit. The received information would allow to have more accurate and complete information about tourists' number, gender, age, purpose and duration of visit. The availability of accurate statistics will increase the efficiency of the research programs of the sector.

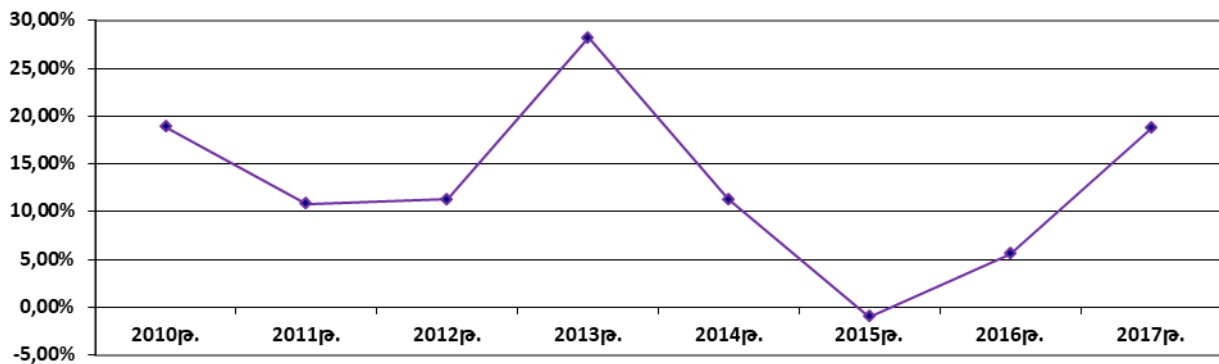


Fig. 2. The change of the number of incoming tourists in Armenia, 2010-2017

In 2017 a new draft of the law on tourism was elaborated. In 2017 the Armenian Tourism Development Fund was established, which supports the Tourism State Committee of the Ministry of Economic Development and Investments of the Republic of Armenia to implement tourism marketing and promote Armenia as an attractive and favorable tourist destination.

In 2017 a cognitive visit of 102 foreign journalists to Armenia from 11 countries of the world (Russia, USA, Germany, Israel, Ukraine, Philippines, China, Korea, Lithuania, Kazakhstan, Lebanon) was organized, as a result of which about 100 articles were published, 12 TV films and programs were made about Armenia's tourist attractions, which were shown by National Geographic Russia, CNN, Travel & Leisure, Russia24, NTV, ORT channels. In 2017 Armenia participated in 5 international exhibitions in Germany, Russia and Kazakhstan (ITB, World Expo Astana, Iran-TITE, Holidays, Astrakhan).

4 tourist information centers were launched in Goris, Sevan (portative), Garni, Dilijan, and new centers were opened in Gyumri and Meghri Free Economic Zone. In 2017 the following festivals were organized: "Syunyats traditions" festival in Goris, a rare carpet-weaving and decorative arts exhibition titled "Cultural Renaissance" in Dilijan, "Gata" Festival in Khachik and "Wine Festival" in Areni.

Last year a new web-page was opened (www.armenia.travel), which provides official information about Armenia for tourists. The site had 530,000 visitors from 144 countries within a month. In this regard, it should be noted that in the past, the official website of Armenian tourism was last updated in 2013, that means that the last four years we did not have such a site. In this regard, it must be noted, that the new site needs to increase the existing information (maybe it is still under development and information completion process). For example, under the heading of religious monuments, there are very few monasteries presented, also there is a brief summary of mineral water and hot springs. Meanwhile, the Institute of Health and Physical Medicine of the Republic of Armenia has separated 10 health resorts in Armenia, which have natural healing

resources (mineral waters, mud, favorable climate conditions). The details about health resort tourism opportunities should be presented separately and detailed. It is also necessary to present the major cities of Armenia with their tourist attractions to promote the development of urban tourism. Besides, now the site is in English only, we hope it will be in Russian, Spanish, French and other languages as well.

In 2017 100 million AMD from the state budget was provided to the tourism sector, and in 2018 272 million AMD will be provided.

According to the Travel & Tourism Competitiveness Report 2017 which is published by the World Economic Forum within the framework of the Global Competitiveness and Risks team and the Industry Partnership Programme for Aviation & Travel, Spain was on the top, followed by France (2nd), Germany (3rd).

Table 1. Travel & Tourism Competitiveness, 2017

<i>Rank</i>	<i>Country/Economy</i>	<i>Score</i>	<i>Change since 2015</i>
1.	Spain	5.43	0
2.	France	5.32	0
3.	Germany	5.28	0
4.	Japan	5.26	5
5.	United Kingdom	5.20	0
6.	United States	5.12	-2
7.	Australia	5.10	0
8.	Italy	4.99	0
9.	Canada	4.97	1
10.	Switzerland	4.94	-4
<i>Neighbour countries of Armenia</i>			
44	Turkey	4.14	0
70	Georgia	3.70	1
71	Azerbaijan	3.70	13
84	Armenia	3.53	5
93	Iran	3.43	4

So, Armenia was in the 84th place among 136 countries ([Travel & Tourism Competitiveness Report 2017](#)).

Table 2. Travel & Tourism Competitiveness Index of Armenia

	<i>2017</i>	
	<i>Rank in 136 countries</i>	<i>Score (1-7)</i>
<i>Travel & Tourism Competitiveness Index</i>	<i>84</i>	<i>3.53</i>
Business environment	39	4.9
Safety and security	34	5.9
Health and hygiene	48	5.9
Human resources and labour market	45	4.8

ICT readiness	71	4.3
Prioritization of Travel & Tourism	71	4.6
International Openness	95	2.6
Price competitiveness	80	4.8
Environmental sustainability	102	3.8
Air transport infrastructure	88	2.2
Ground and port infrastructure	88	2.9
Tourist service infrastructure	74	3.9
Natural resources	89	2.6
Cultural resources and business travel	99	1.4

Armenia was ranked number one in the world in terms of population's access to clean drinking water and mobile network coverage and was at the bottom of the list in terms of the number of HIV-infected people. Armenia was also the 34th in terms of safety, 48th in terms of health care, 123rd in terms of ease of finding skilled employees, 74th in terms of tourism services infrastructure, 80th in terms of price competitiveness, 95th in terms of effectiveness of marketing and branding to attract tourists, etc. So we have a lot to do to improve our tourism competitiveness index.

3. Discussion

Many types of tourism may be developed in Armenia based on the existing assets:

1. Religious tourism – Armenia is the first country to adopt Christianity as a state religion (in 301 A.C.). Churches of Echmiadzin, Khor Virap, Geghard, Haghartsin, Goshavank, Haghpat and Sahinahun, Tatev, Noravank are unique sacred places with their historic traditions that can attract tourists from different corners of the world.

2. Historical-cultural tourism - Armenia has an ancient history and rich cultural heritage. There are more than 24,000 historical and cultural monuments in Armenia. The list of UNESCO's "World Cultural Heritage" includes the Haghpat and Sanahin monasteries, the Geghard complex and the upper valley of Azat, the Churches of Echmiadzin and the Mother See of Holy Etchmiadzin Temple, Zvartnots Archaeological Temple. The UNESCO's non-material cultural heritage list includes the Armenian duduk and its music, the art of Armenian khachkars, Sasna Tsrer or Sasuntsi Davit epos, traditional Armenian bread lavash, and kochari, traditional Armenian group dance.

3. Spa-resort tourism – There are 10 resort zones in Armenia (Arzni, Dilijan, Hankavan-Marmarik, Bjni-Arzakan-Aghveran, Stepanavan-Gyulagarak, Tsaghkadzor, Syunik, Lori, Sevan, Jermuk), which have natural healing resources (mineral water, curative mud, favorable climate conditions for the organization of climate therapy) (Harutyunyan, 2010).

4. Gastrotourism – Armenian cuisine is one of the oldest cuisines in Asia. The Armenian delicious dishes (barbecue, kebab, dolma, khashlama, khash, harrisa, ghapama, lavash, wine, cognac, etc.) are attracting tourists. The old wine factory, discovered in one of the caves in Areni village, is proof that Armenians were engaged in winemaking activities more than 6,000 years ago. Wine tourism, as a variety of gastronomic, also has prospects of growth.

5. Agritourism – There are several agricultural fairs and festivals organized in Armenian villages. Specially organized agritours, which will include agricultural activities, will promote agricultural tourism and rural development.

6. Ecotourism – Armenia has picturesque nature and rich greenery, meadows, forests and green gardens. The interest towards ecotourism is rising in recent years.

7. Urban tourism – Pink Yerevan, being one of the oldest cities in the world, is a museum under the open air, with its old and new buildings, rich history and culture. In addition to Yerevan, there are prospects for tourism development in Echmiadzin, Gyumri, Goris, Vanadzor, Ijevan, Dilijan, Tsakhkadzor and other cities.

8. Medical tourism – In recent years, the number of tourists for treatment purposes has increased. In the list of preferred services dental and surgical services are included mostly.

9. Sport and adventure tourism - Armenia has many prerequisites for the development of sports and adventure tourism. The best places for skiing are Tsakhkadzor, Jermuk, Aparan,

Ashotsk and Amasia, for water sports - Lake Sevan. Adventure tourists may go to Mount Aragats, Ajdakak, Khustup Mountains, or take hiking tours in Lastiver, Trchkan, Shaky waterfalls, Noravank gorge, Garni canyon, from Dilijan forest to Parz lake and so on.

10. Educational tourism – In Armenia, many higher educational institutions have international students or international joint programs, which allows students to have short-term or long-term visits for educational or research purposes.

11. Scientific tourism – The scientific history and potential of Armenia is a prerequisite for the development of scientific tourism in our country. Ancient sites, preserves, medieval universities, scientific organizations, scientific museums may be attractive for tourists.

4. Conclusion

Although the growth of tourism in recent years, there are still many problems that hinder the promotion of tourism. As mentioned above, the statistics, marketing policy, legislation must be improved. Besides, the educational system must meet the requirements of the labor market. Tourist specialists must have all the skills for tourism industry development.

It is planned to have 3 mln tourists in 2022. However, the change in the number of tourists in the previous years shows that in 2017 the growth may not be considered as a surprise, so we need more complex activities for the promotion of tourism.

In 2018 Yerevan will become 2800 years old. This event should be actively advertised in order to bring many international tourists to celebrate the day of one of the oldest cities in the world. In addition to this, Armenia should also be presented abroad as the first Christian country, the country of wine and apricot, the homeland of worldwide famous Armenians (Charles Aznavour, Henrik Mkhitaryan, Serj Tankian, Sheryl Sargysyan and others). Increasing the effectiveness of marketing policy will contribute to the development of tourism.

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