



**MINISTRY OF ECONOMIC
DEVELOPMENT AND INVESTMENTS
OF THE REPUBLIC OF ARMENIA**

TOURISM AND HOSPITALITY SECTOR

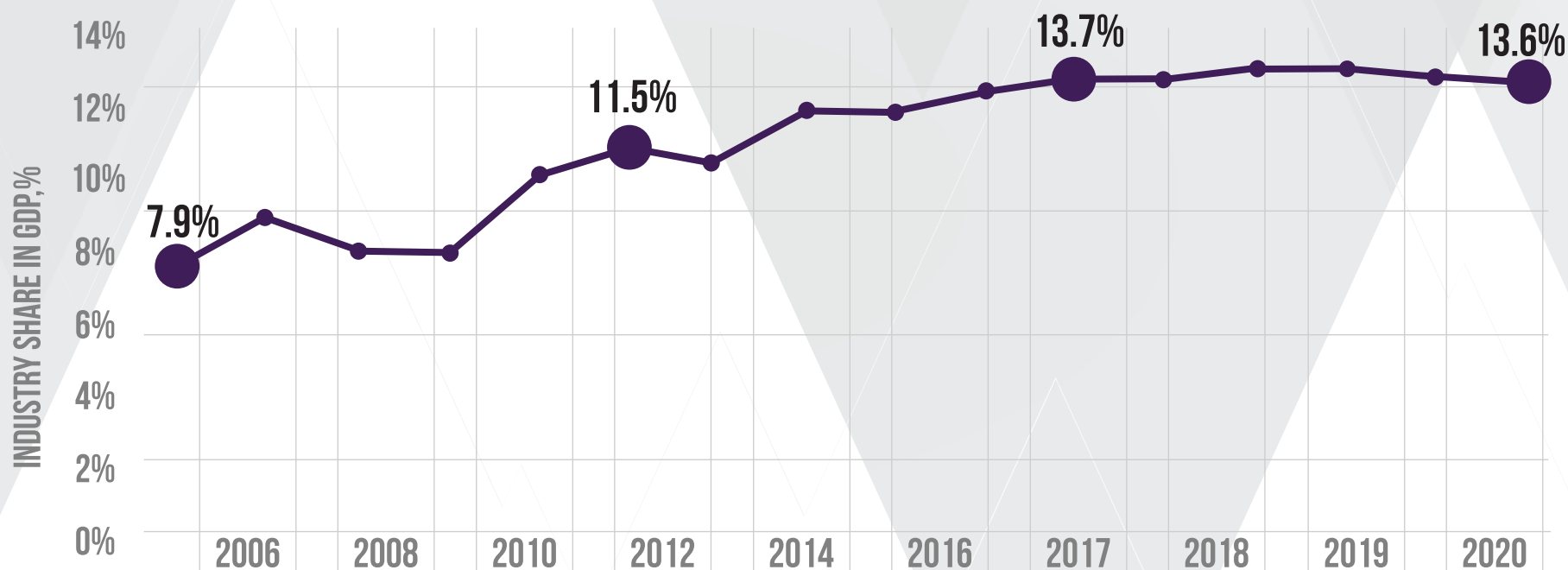
MS. ZARMINE ZEITOUNTSIAN
CHAIRPERSON
STATE TOURISM COMMITTEE OF THE REPUBLIC OF ARMENIA

SECTOR OVERVIEW

- ▶ World average 3.1%
- ▶ Europe average 9.6%

TOURISM AS ONE OF THE MAIN DRIVERS OF ECONOMY

Total contribution of travel & tourism sector to GDP

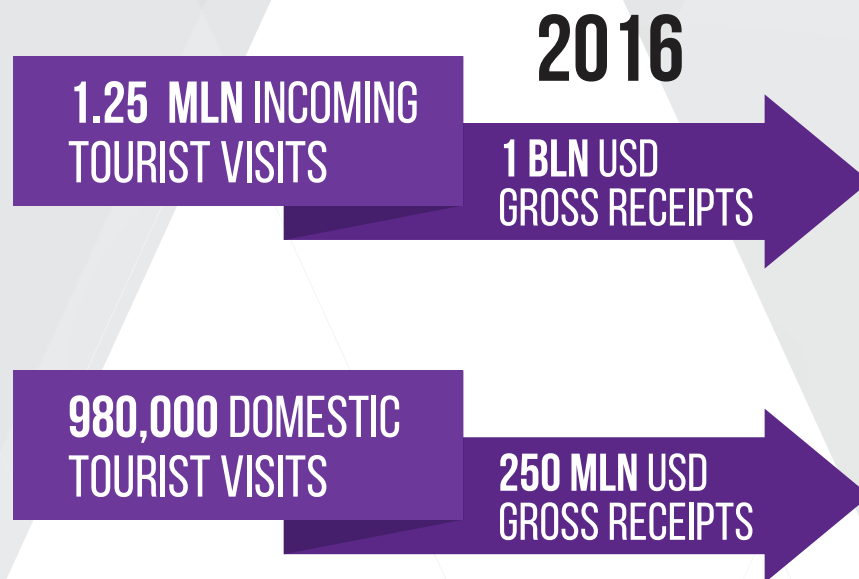


SOURCE: WORLD TRAVEL AND TOURISM COUNCIL

TOURISM AND
HOSPITALITY SECTOR

SECTOR OVERVIEW

TOURISM AND
HOSPITALITY SECTOR



GROSS RECEIPTS

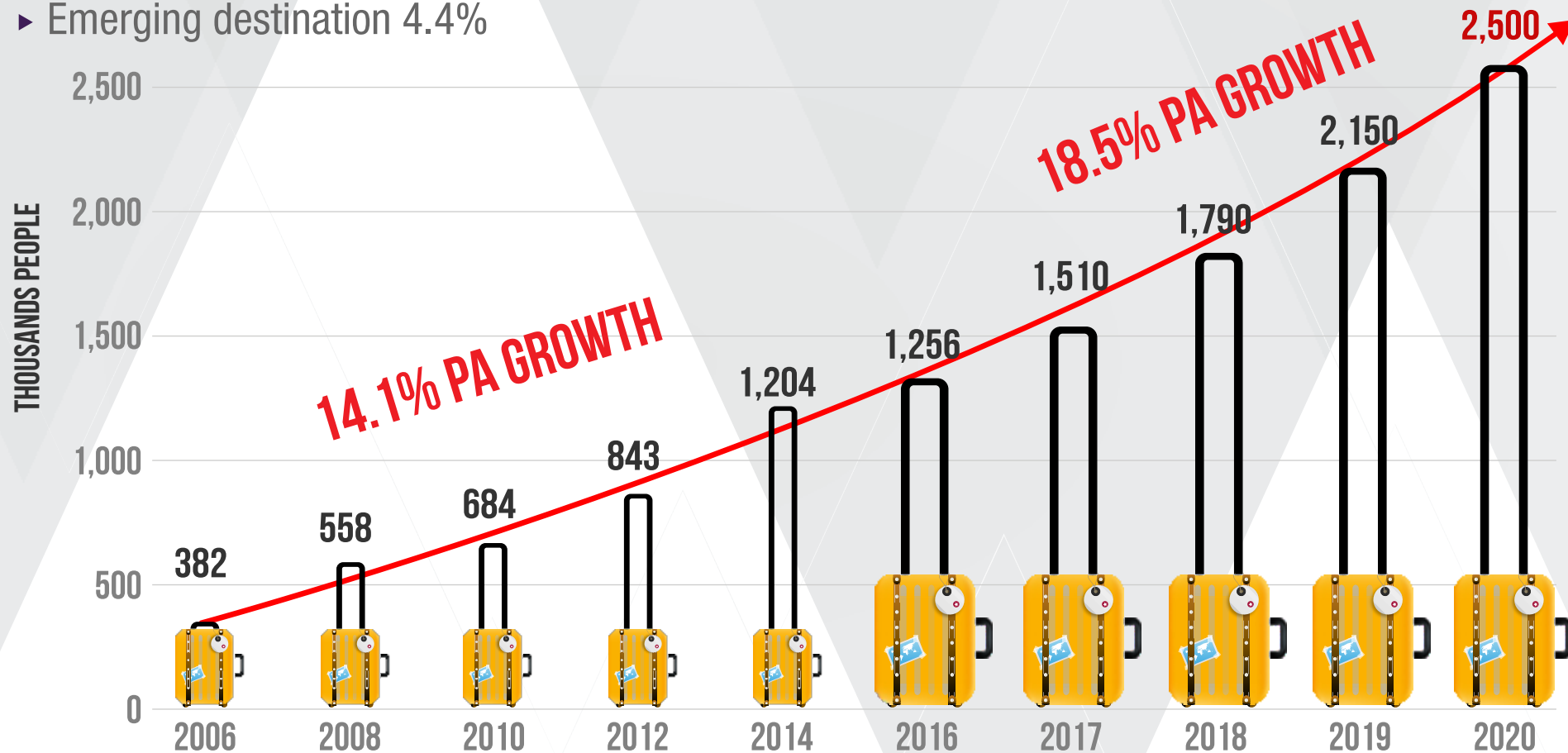
Source: Armenian international visitor survey

*Average spending \$800 per tourist,
Expected average spending by 2020 – \$1000 per tourist

SECTOR OVERVIEW

- ▶ World average 3.3%
- ▶ Emerging destination 4.4%

INTERNATIONAL TOURIST ARRIVALS ACCELERATED GROWTH



COMPARABLE WITH:

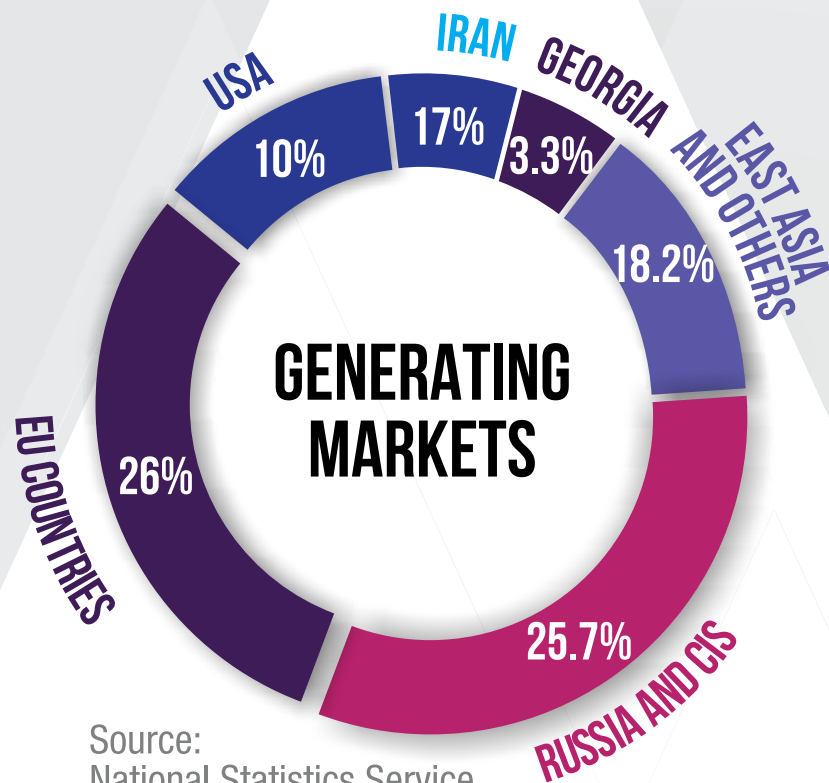
The Bahamas
1,472,000

Montenegro
1,560,000

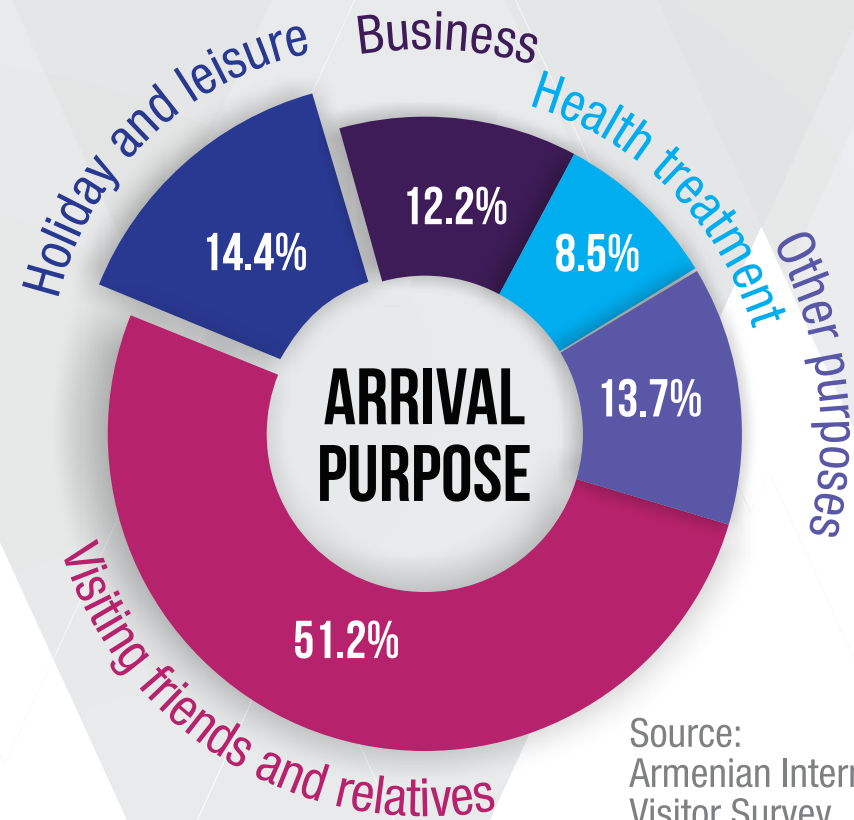
TOURISM AND
HOSPITALITY SECTOR

SOURCE: NATIONAL STATISTICS SERVICE

SECTOR OVERVIEW



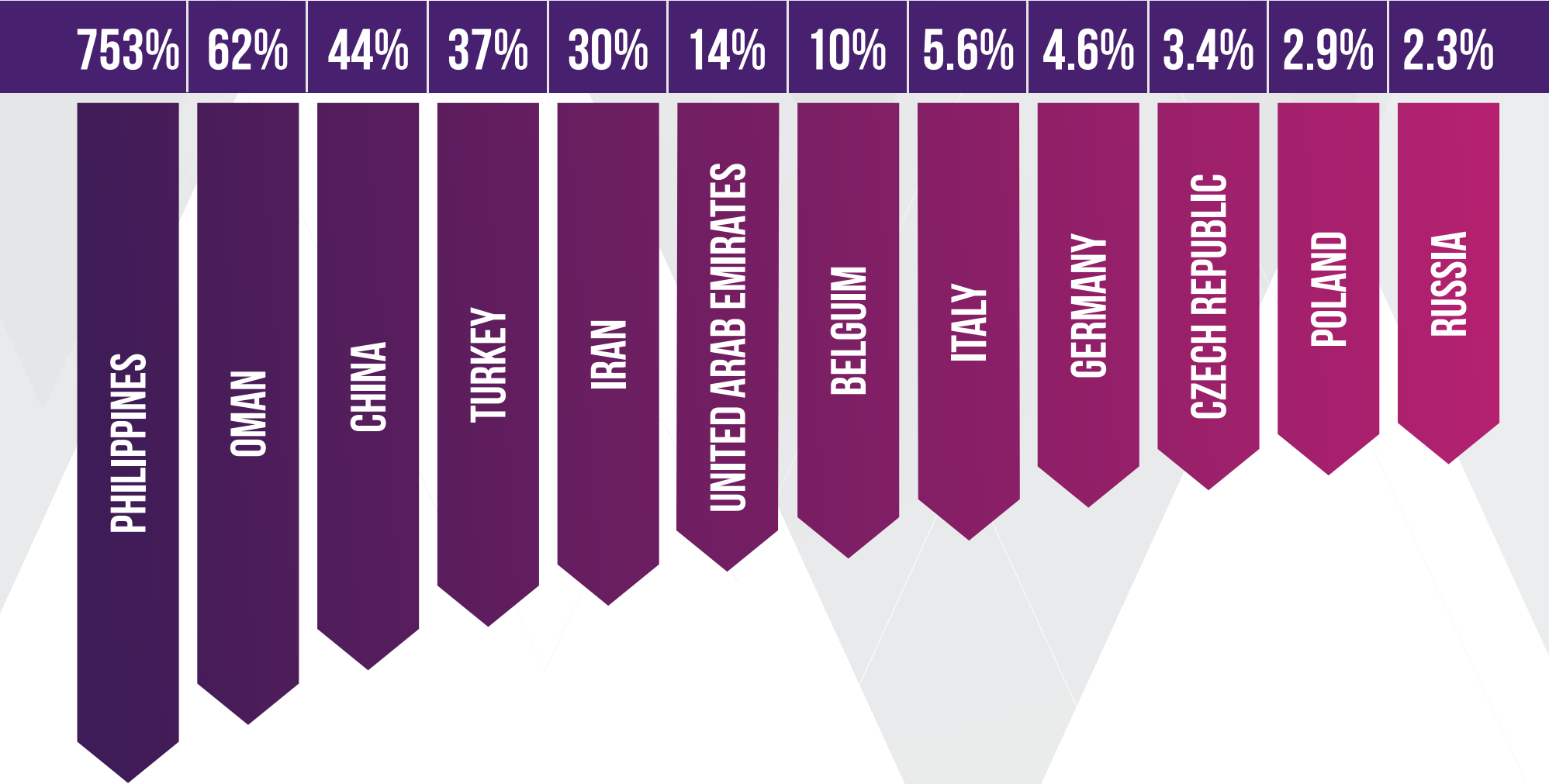
Source:
National Statistics Service



Source:
Armenian International
Visitor Survey

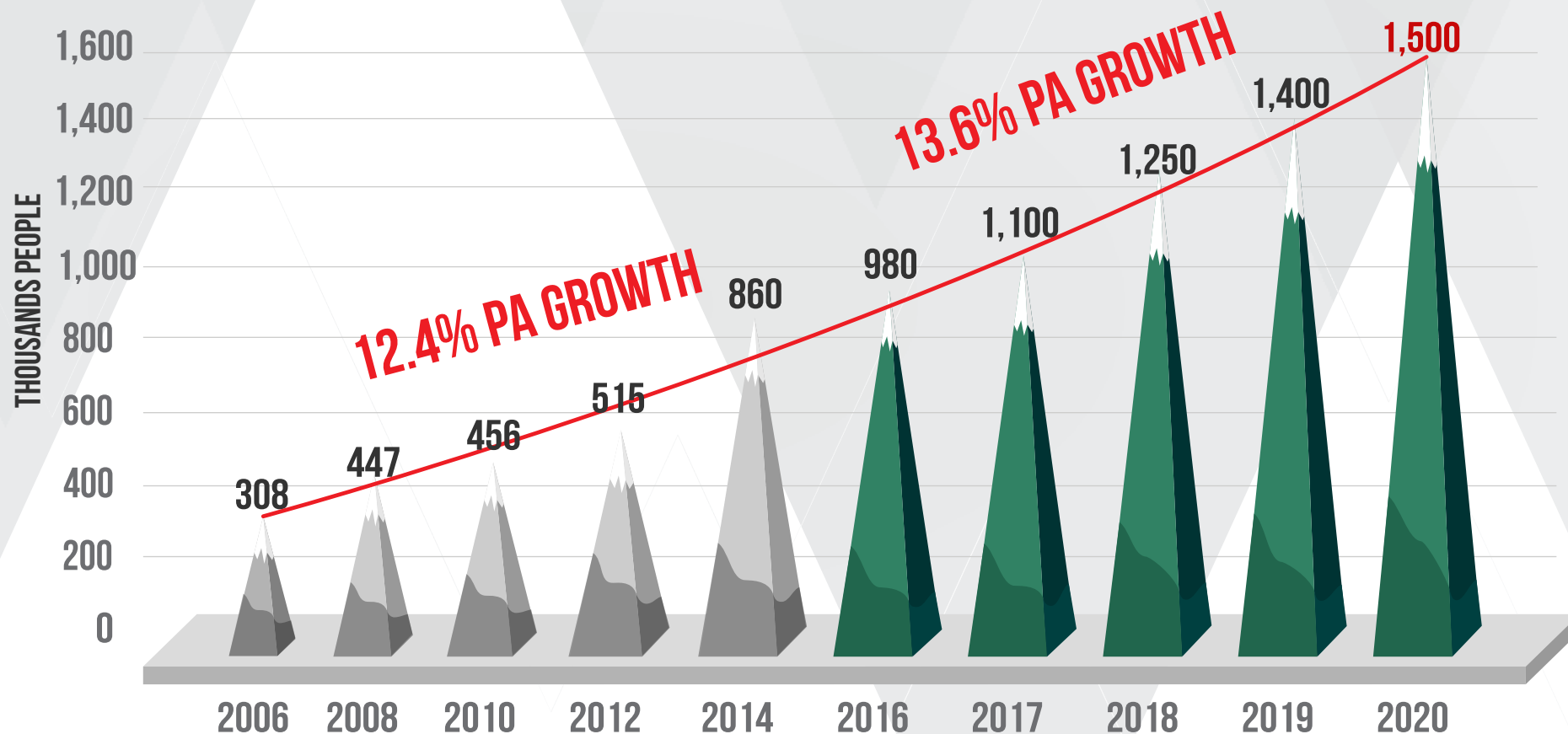
SECTOR
OVERVIEW

COUNTRIES CONTRIBUTING TO TOURISM GROWTH % 2016



SECTOR OVERVIEW

DOMESTIC TOURISM STEADY GROWTH



SOURCE: NATIONAL STATISTICS SERVICE

TOURISM AND
HOSPITALITY SECTOR

SECTOR OVERVIEW

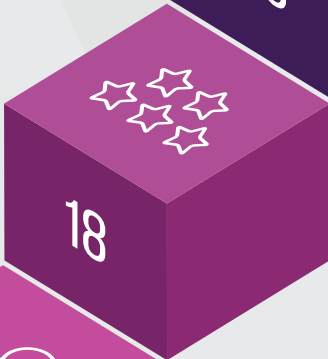
ACCOMMODATIONS

NUMBER OF ACCOMMODATION ESTABLISHMENTS



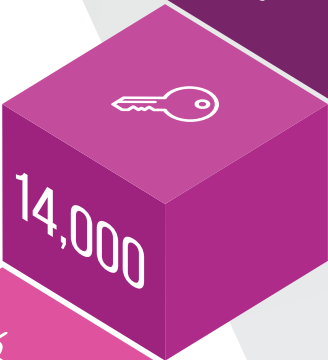
256/60% - IN REGIONS
184/40% - IN YEREVAN

QUALIFIED HOTEL ESTABLISHMENTS

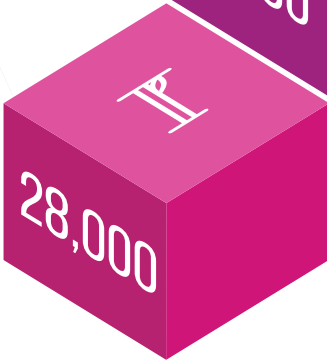


11 HOTELS	6 REST HOUSES	1 RESORT
5*DELUXE- 2 5*- 1 4*- 5 3*- 1 2*- 1 1*- 1	II CLASS- 1 III CLASS- 5	III CLASS- 1

NUMBER OF ROOMS



NUMBER OF BEDS



SECTOR OVERVIEW

TOURISM AND
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INTERNATIONAL HOTEL BRANDS IN ARMENIA

OPERATING HOTELS



2 HOTELS



5 HOTELS



2 HOTELS



IN THE PIPELINE



IN 2017



IN 2017



IN 2018



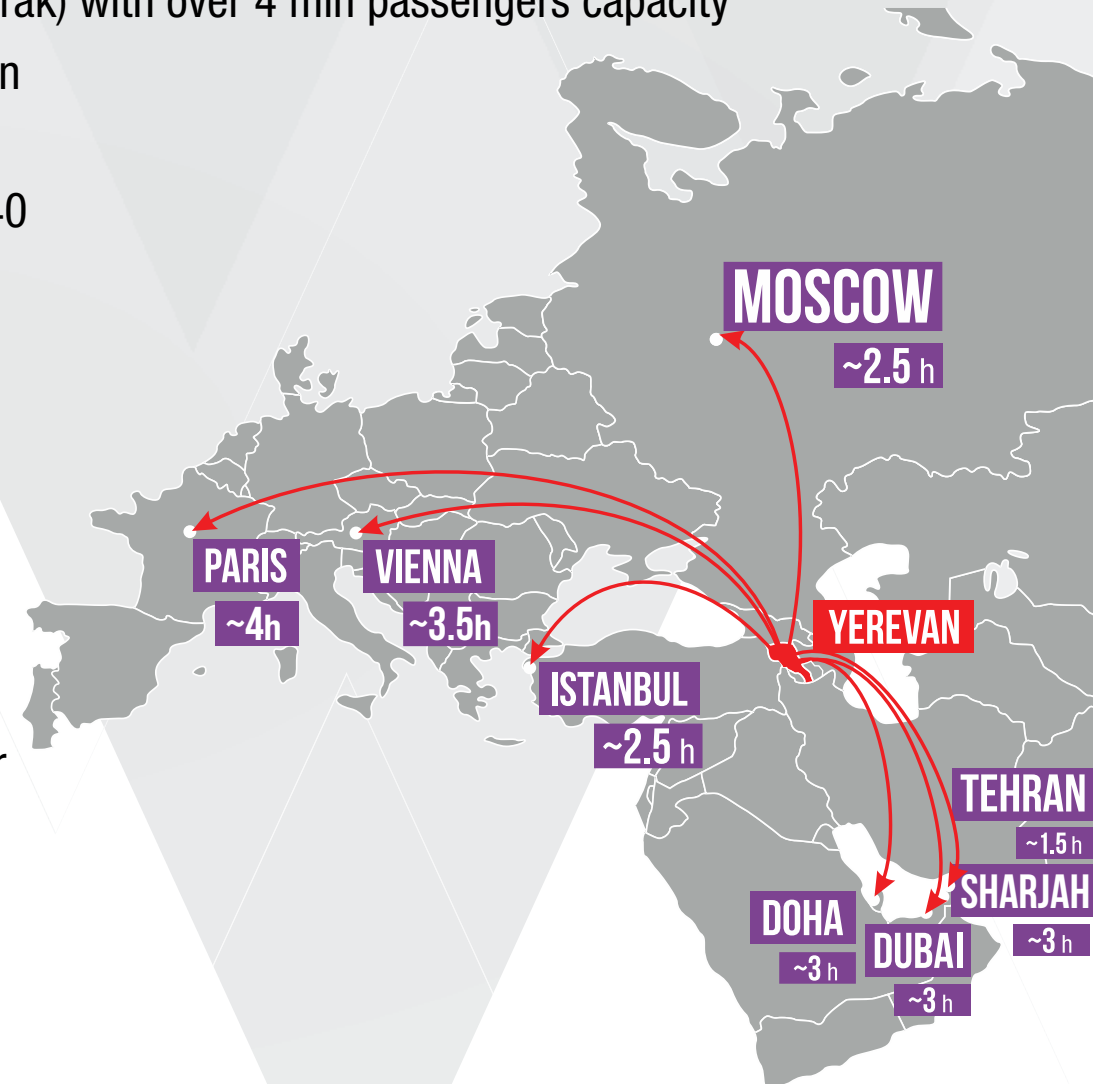
IN 2018

FDI INTO SECTOR EXCEEDS \$ 500 MLN

POLICY

- Two international airports (Zvartnots and Shirak) with over 4 mln passengers capacity
- Attracted investments of more than \$400 mln
- 23 airlines linking Armenia to the world
- Annual passenger traffic for 2016: 2,105,540
- October 2013 - introduction of Open Skies Policy in the field of civil aviation in Armenia
- Continuous revision and liberalization of existing Air Services Agreements with partner States and initiation of new partnerships.
- Free-market and favorable business environment allow for constructive negotiations with airlines
- Yerevan “Zvartnots” airport - ideal connector between North, East and West

IMPROVED ACCESSIBILITY



POLICY

TOURISM AND
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PILLARS OF TOURISM POLICY



POLICY

INTERNATIONAL COOPERATION AND PARTNERSHIP



Smithsonian
Institution



World Federation of
Tourist Guide Associations

TOURISM AND
HOSPITALITY SECTOR

WHY ARMENIA ?

TOURISM AND
HOSPITALITY SECTOR



YOUR NEXT TOURISM DESTINATION

- ◆ ACCESSIBILITY
- ◆ PROXIMITY
- ◆ AFFORDABILITY
- ◆ FAMILY ORIENTED
- ◆ MILD CLIMATE
- ◆ THE HOSPITALITY
- ◆ RANKED EIGHTH ON LAST YEAR'S
"HOW SAFE DO YOU FEEL?" GALLUP POLL

WHY ARMENIA ?

ANCIENT HISTORY AND RICH CULTURAL HERITAGE



TOURISM AND
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WHY ARMENIA ?

ABUNDANCE OF NATURAL ATTRACTIONS



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WHY ARMENIA ?

TOURISM AND
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WINTER IN ARMENIA



WHY ARMENIA ?

TOURISM AND
HOSPITALITY SECTOR

DIVERSE AND AUTHENTIC CUISINE



WHY ARMENIA ?

VIBRANT AND MODERN URBAN LANDSCAPE



TOURISM AND
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WHY ARMENIA ?

TOURISM AND
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MEDICAL AND WELLNESS



WHY ARMENIA ?

TOURISM AND
HOSPITALITY SECTOR

CORPORATE SPIRIT



WHY ARMENIA ?

INVEST IN ARMENIA STRENGTHS AND OPPORTUNITIES

- ◆ Visa free regime for citizens of more than 50 countries
- ◆ Upon arrival visa for citizens of more than 140 countries
- ◆ No restrictions on real estate ownership
- ◆ Market to double by 2020
- ◆ Over 7 mln Armenian Diaspora
- ◆ Demand for accommodations and tourism infrastructure
- ◆ Demand for MICE infrastructure
- ◆ PPP opportunities

WHY ARMENIA ?

TOURISM AND
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PPP PROJECTS IMPORTANT TOOL FOR DEVELOPMENT



- ▶ Tatev Revival Project
- ▶ Master plan for Jermuk
- ▶ Dilijan Development Project
- ▶ Master plan for Southern Tourism Corridor