



SURVEY ON THE SERVICES OF CATERING SERVICE PROVIDERS IN SHIRAK, LORI AND TAVUSH REGIONS OF RA



Acknowledgements

This publication has been produced with the financial assistance of the European Union. The contents of this publication are the sole responsibility of Tour Advice LLC and can under no circumstances be regarded as reflecting the position of the European Union.

Within “The Innovative Tourism and Technology Development for Armenia” project under EU4Business initiative, “Tour Advice” travel agency has carried out “New touristic itineraries taking into account the new sanitary and safety measures” project. In the scope of the project, the staff members of the travel agency conducted a research on the service diversity and quality of catering service providers of Lori, Tavush and Shirak regions. Afterwards, a questionnaire was prepared in order to conduct a survey on the service range of catering service providers in the target regions.

The survey was conducted and the results were analyzed by the executive director of “Tour Advice” travel agency Artak Avetisyan, deputy director Varduhi Sevachyan, inbound tour manager Alina Hovikyan and tour manager Arpine Hunanyan starting from the 15th of September to the 15th of December, 2020.

Contents

Acknowledgements	2
Section 1. Executive Summary	4
Section 2. Objectives	4
Section 3. Research Methodology	4
Section 4. Interpretation of Results	5
Conclusion	16
Appendix	17

Section 1. Executive Summary

The questionnaire was prepared by "Tour Advice" LLC within the frameworks of The EU4Business "Innovative Tourism and Technology Development for Armenia" project, co-funded by the European Union and the Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by German Development Cooperation GIZ through the Private Sector Development and TVET South Caucasus Programme. The project is part of the EU4Business initiative of the European Union.

The purpose of the questionnaire is to discover the range of services offered at the catering service providers of Shirak, Lori and Tavush provinces. Due to the collected data, the types of offered food and beverages, level of awareness on sanitary norms and its applicability was determined. As a result, analyzing all the data, new menus will be created in cooperation with the selected beneficiaries.

Section 2. Objectives

The objectives of the survey are the following regarding the catering service providers of Shirak, Lori and Tavush regions:

- to identify the languages the menus are displayed in;
- to find out the introduction level of the ingredients of the offered dishes and their photos;
- to discover the origin of products catering service providers use for the dishes;
- to estimate the average number of catering service providers that offer regional cuisine;
- to discover the types of cuisine offered in the catering service providers;
- to find out the types of food Armenian travelers prefer;
- to identify the types of beverages Armenian travelers prefer;
- to identify the languages staff members communicate with;
- to discover the additional services offered by catering service providers;
- to discover the level of awareness on Covid-19 safety and sanitary norms of catering service providers.

Section 3. Research Methodology

In line with conducting the online questionnaire, semi-structured interviews were employed with the potential ventures. The method of purposive sampling was chosen in order to make contact with all the existing catering service providers of the target regions. The size of the sample largely was based on the data available on various travel websites, such as www.tripadvisor.com. In addition, there was

extensive collaboration with the travel professionals of Tavush Tourism Research & Development Center, who provided us with the list of all the catering service providers of Tavush province. Information about the catering service providers in Lori province was provided by our expert and experienced tour guide from Lori region, Saro Ohanyan. Data on the accommodations of Shirak region was extracted from the above-mentioned website.

Section 4. Interpretation of Results

Overall, the staff members of Tour Advice LLC has contacted more than 150 catering service providers in the target regions of Lori, Tavush and Shirak via both phone calls and e-mail.

An online questionnaire was sent to more than 100 accommodation providers located in the target regions. Here are the results:

- a) 71 accommodations were contacted in Tavush province, out of which
 - Response rate - 21
 - Non-response rate - 35
 - Not working in the times of Covid-19 pandemic - 15

- b) 40 accommodations were contacted in Shirak province, out of which
 - Response rate - 17
 - Non-response rate - 15
 - Not working in the times of Covid-19 pandemic - 8

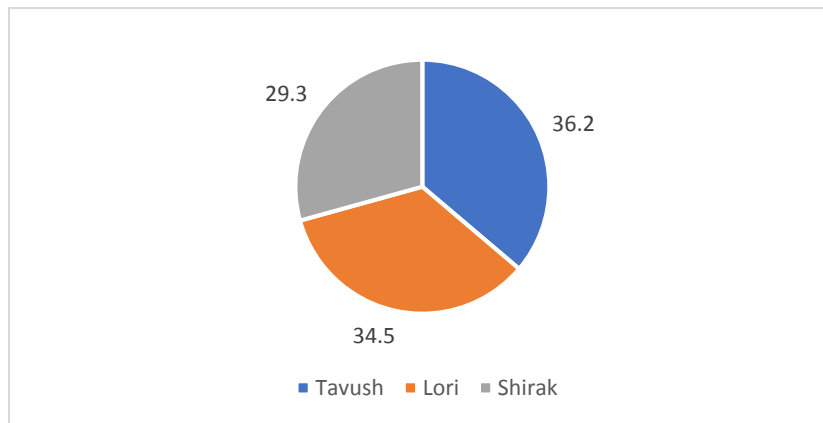
- c) 36 accommodations were contacted in Lori province, out of which
 - Response rate - 20
 - Non-response rate - 12
 - Not working in the times of Covid-19 pandemic - 4

As a result, overall 60 responses were accumulated.

Q1 Name of a catering service provider.

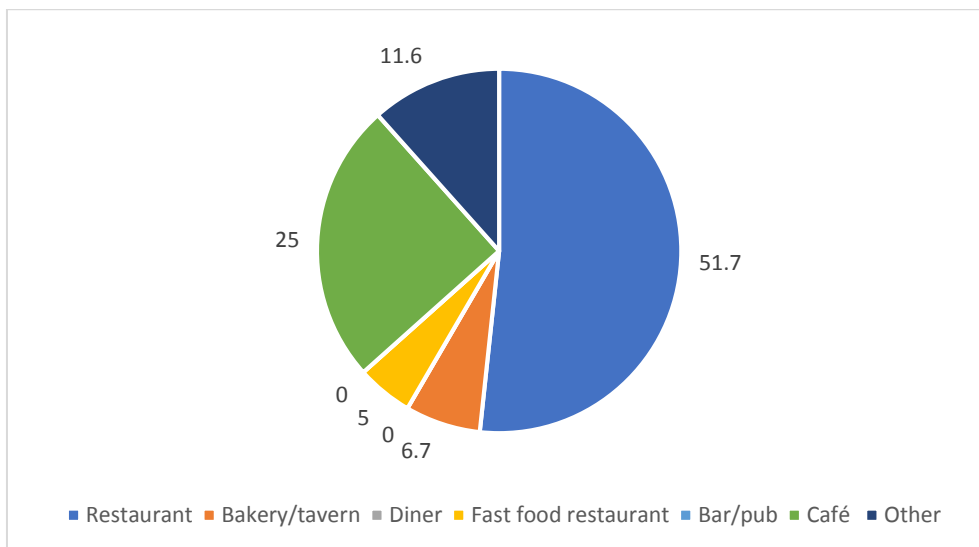
Surveyees were asked to fill out the names of their catering service providers so that they would later be contacted. Total number of respondents is 60.

Q2 Location of a catering service provider.



Question 2 aims to discover the location of the catering service providers that participated in the survey. The majority of respondents are from Tavush province, comprising 36.2% of the overall response rate with 21 surveyeys. Next comes Lori province, making up 34.5% of the total rate, with 20 participants. The least number of surveyeys are recorded from Shirak province, being marked by 29.3% of the overall rate, with 17 participants. Total number of respondents is 58.

Q3 Identify the type of catering service provider.



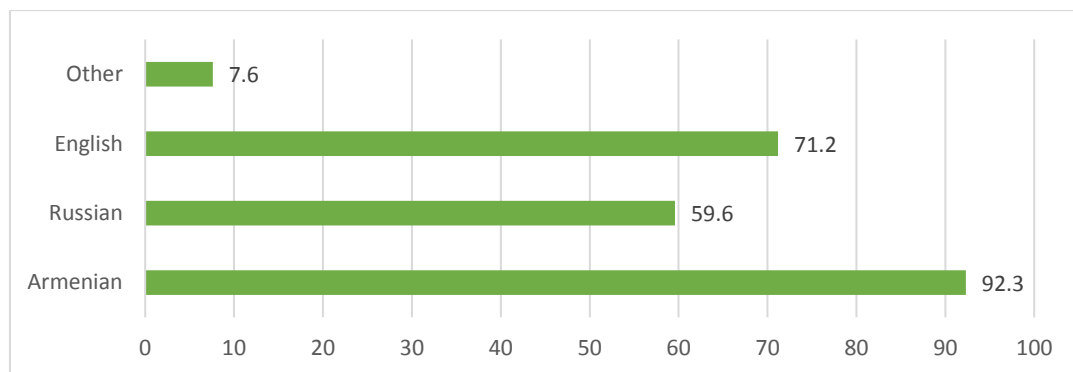
The aim of Question 3 is to discover the types of catering service providers that exist in the target regions. Restaurants make up the majority of the surveyeys with 31 participants /51.7%/. Cafés come next with 15 respondents and contribute with 25% of the total response rate /15 responses/. Other respondents include bakeries and taverns /6.7% with 4 responses/, fast food restaurants /5% with 3 responses/, etc. Total number of respondents is 60.

Q4 Do you have a menu?

Answer	N of responses	%
Yes	56	93.3
No	4	6.7

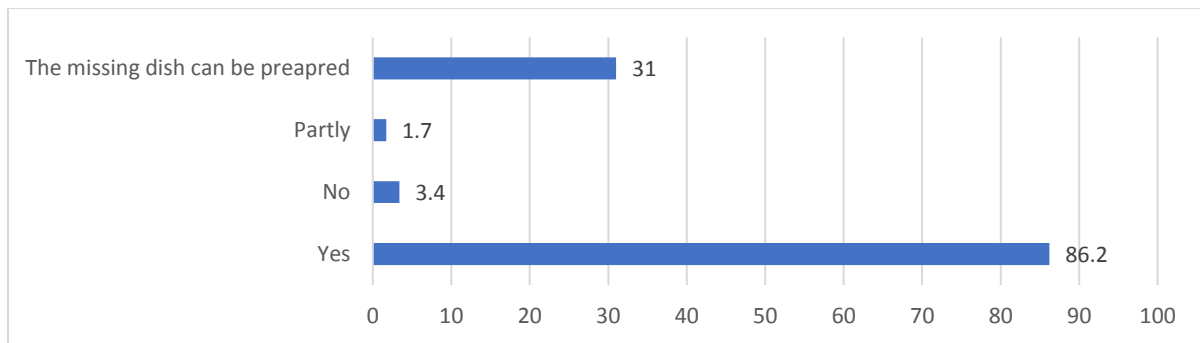
The purpose of Question 4 is to find out if catering service providers have menus. The majority of the respondents /56 surveyees/ mentioned they have corresponding menus marking up 93.3% of the total response rate. Only 4 participants mentioned they either do not have menus or are currently working on it. This marks up 6.7% of the overall response rate. Total number of respondents is 60.

Q5 In which languages are the menus are displayed in?



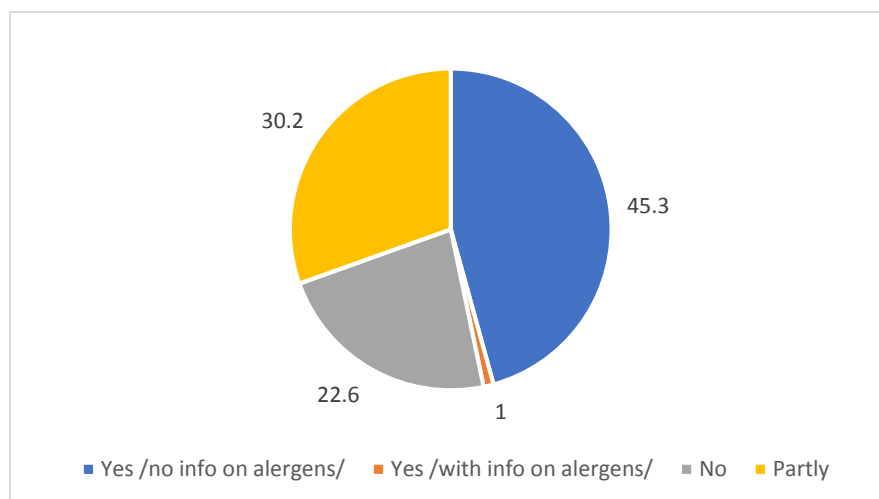
Question 5 is aimed at discovering in which languages menus are displayed in. The highest number is recorded for Armenian, with 48 participants that makes up 92.3% of the total response rate. English comes next with 37 responses and marks up 71.2% of the overall rate. Russian received 31 responses and contributes with 59% to the overall rate. Total number of respondents is 52.

Q6 Are all the dishes mentioned in the menus?



The goal of Question 6 is to find out if all the offered dishes are mentioned in the menu. The majority of the surveyees /50 participants/ mentioned that they offer all the dishes mentioned in the menu, thus marking up 86.2% of the overall rate. Moreover, 18 surveyees added that the missing dish can be prepared if requested /31%/. Only a small part of surveyees claimed that some dishes may not be included in the menus but will be prepared if there will be demand. Total number of respondents is 58.

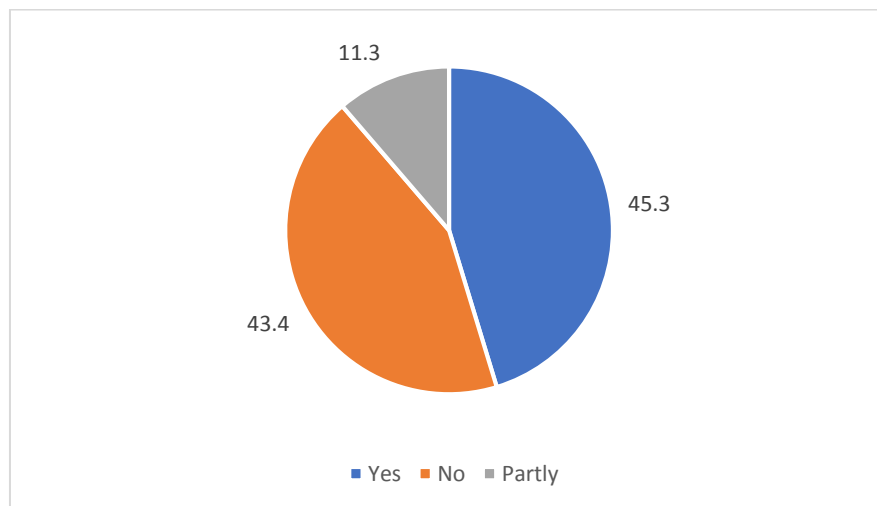
Q7 Are the ingredients of the dishes mentioned in the menu?



The aim of Question 7 is to identify if the ingredients of the dishes are mentioned in the menus of the catering service providers of the target regions. The majority of the surveyees /24 responses/ claimed that their menus display the ingredients of the offered dishes, thus marking up 45.3% of the overall rate. Some other 16 catering service providers mentioned that ingredients are either not mentioned

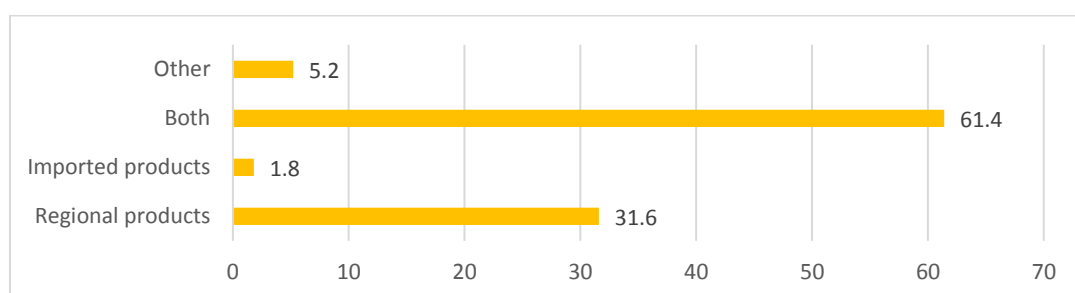
for all the dishes or the information on ingredients is not introduced in detail. This makes up 30.2% of the total response rate. Other participants /12 responses/ reported that their menus do not indicate the corresponding ingredients. Total number of respondents is 53.

Q8 Are the photos of the dishes displayed in the menu?



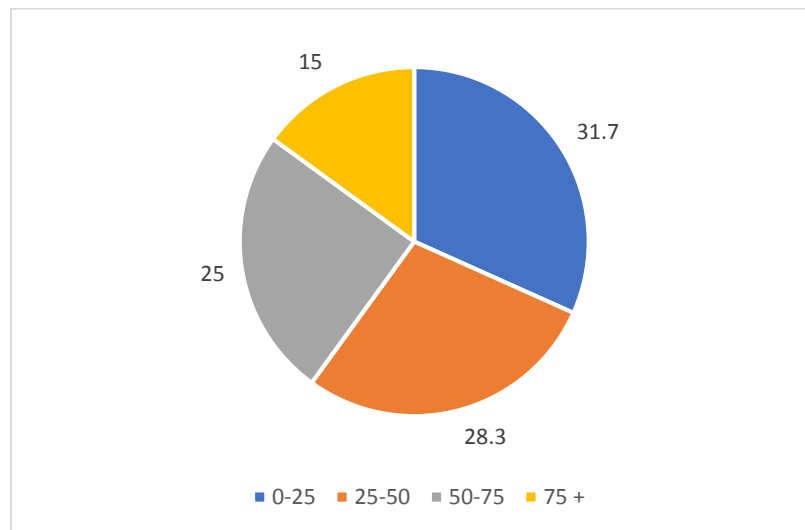
The goal of Question 8 is to discover if the menus of catering service providers display the photos of the dishes. The majority of respondents claimed that their menus include photos of the dishes, comprising 45.3% of the total rate with 24 responses. Some other 23 surveyees mentioned their menus do not incorporate photos of the dishes and this makes up 43.4% of the total response rate. Only 11.3% of the respondents claimed that not all the photos of the dishes are displayed. Total number of responses is 53.

Q9 What is the origin of the products you use in the dishes?



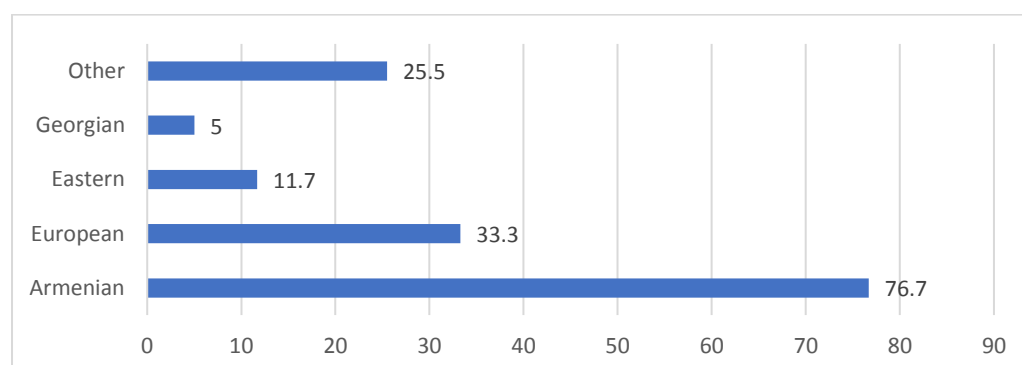
The aim of Question 9 is to identify the origin of the products used by catering service providers. The majority of respondents claimed that they use both imported and regional products, thus marking up 61.4% of the total response rate /35 responses/. On the contrary, minimum response rate is recorded for 'imported products', marking up 1.8% of the overall rate with only 1 response. Total number of respondents is 57.

Q10 What is the percentage of local dishes in the menu?



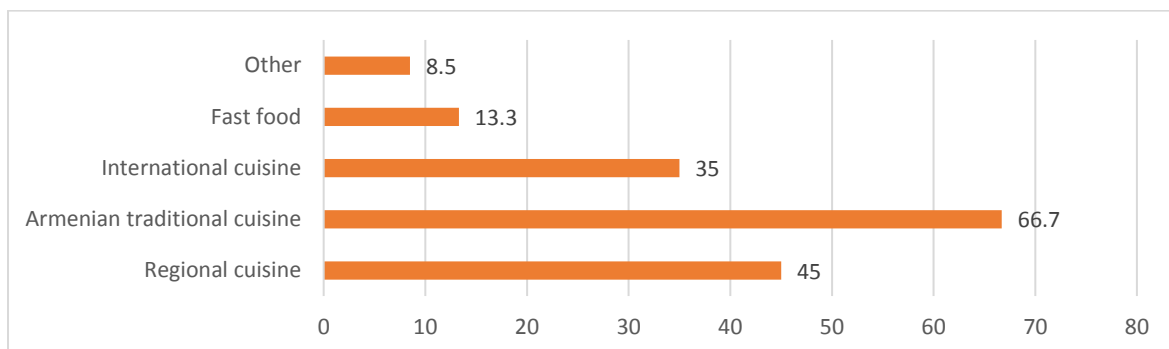
The goal of Question 10 is to identify the extent to which regional dishes are included in the menus. The majority of respondents that comprises 19 surveyees mentioned that only 0-25% of their menus include regional cuisine /31.7% of responses/. Regional cuisine that comprises 25-50% of menus were reported by 17 participants /28.3% of responses/. 15 respondents /25%/ mentioned that 50-75% of their menus include regional dishes. Only 9 participants claimed that 75+ % of their menus have corresponding regional dishes /15% of responses/. Total number of respondents is 60.

Q11 Cuisines of which country do you offer?



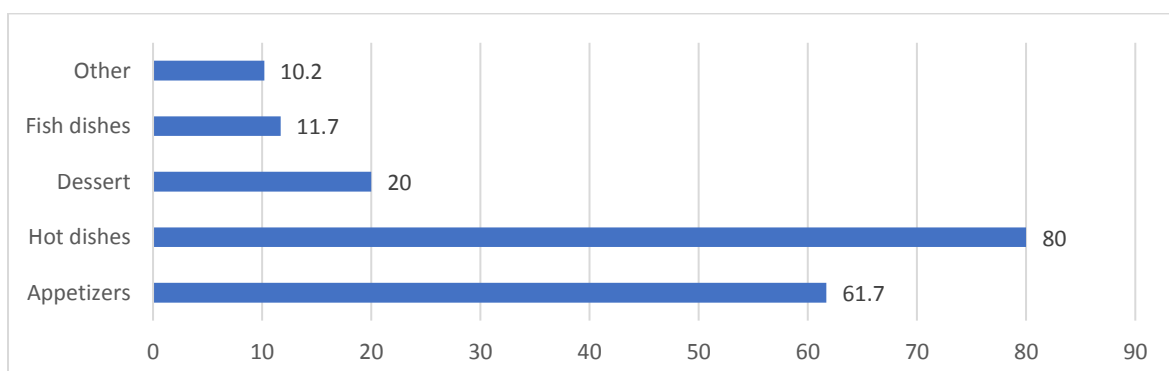
Question 11 is aimed at discovering which cuisines are offered at the regional catering service providers. The majority of the surveyees /46 responses/ mentioned that their menus include mainly Armenian traditional dishes, marking 76.7% of the total rate. European cuisine is offered by 33.3% of the surveyees /20 responses/. Minimum response rate is recorded for Georgian cuisine with only 3 responses, marking up 5% of the overall response rate. Total number of respondents is 60.

Q12 What are the best selling dishes among local travelers?



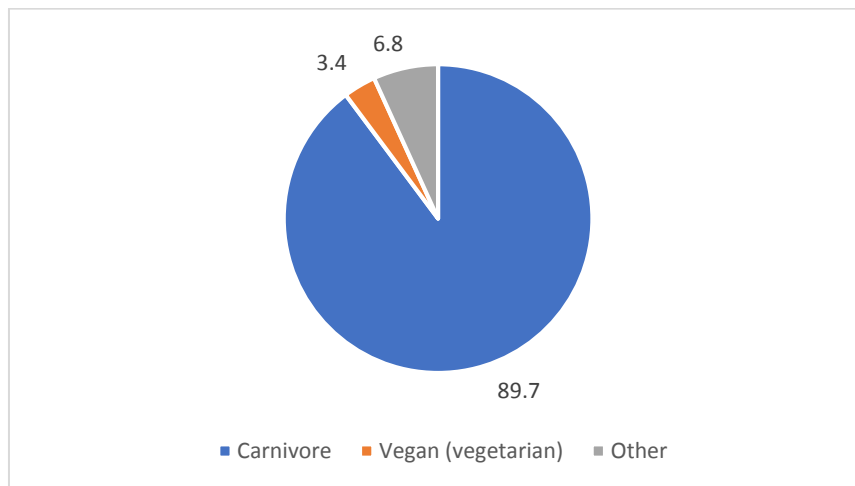
Question 12 identifies the top dishes preferred by Armenian travelers. The majority of the respondents that comprise 66.7% of the total rate /40 responses/ prefer Armenian traditional cuisine. Regional cuisine is chosen by 27 surveyees and makes up 45% of the total rate. 21 respondents prefer international cuisine, marking 35% of the overall response rate. The minimum response rate is recorded for “fast food”, making up 13.3% of the overall rate. Total number of respondents is 60.

Q13 What kind of dishes do Armenian travelers mainly order?



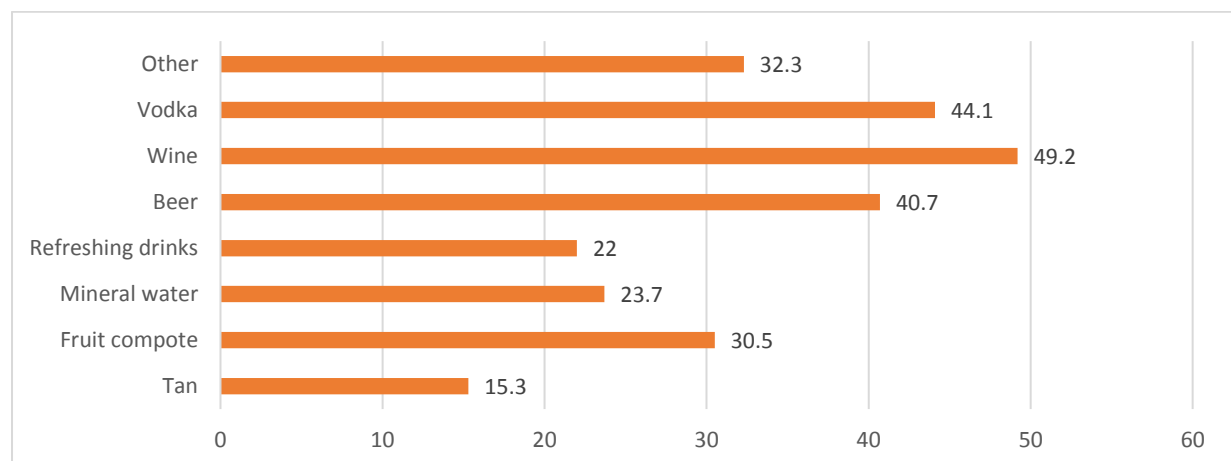
The aim of Question 13 is to discover the type of dishes Armenian travelers prefer. Option “hot dishes” received the majority of responses (48 surveyees), thus contributing 80% to the total response rate. “Appetizers” was chosen by 37 surveyees and makes up 61.7% of the total rate. As for “dessert”, it was picked by 12 participants, thus making up 20% of the overall response rate. Only 7 participants chose option “fish dishes”, marking up 11.7% of the overall rate. Total number of respondents is 60.

Q14 What kind of food do Armenian travelers prefer?



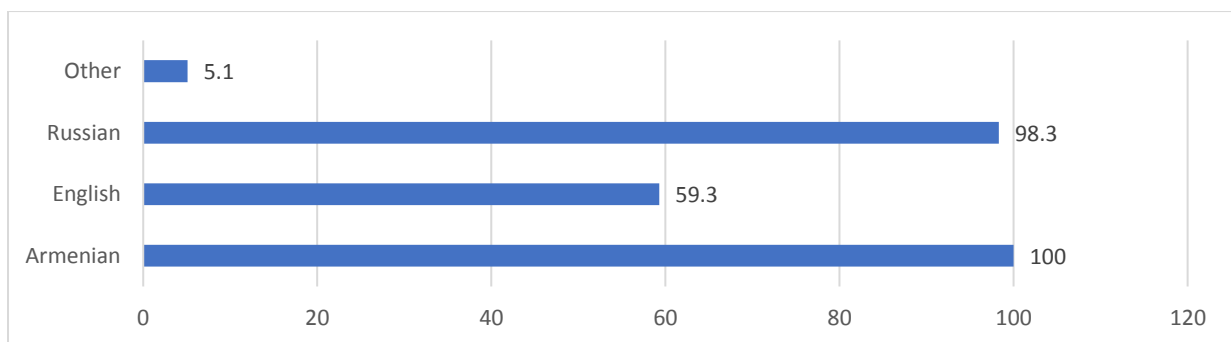
The goal of Question 14 is to identify the origin of dishes preferred by Armenian travelers. 52 surveyees marked their customers as carnivores, totaling 89.7% of the response rate. On the contrary, 2 participants claimed their guests are mainly vegetarians, contributing 3.4% to the overall rate. Total number of respondents is 58.

Q15 What kind of alcoholic and non-alcoholic beverages do Armenian travelers prefer?



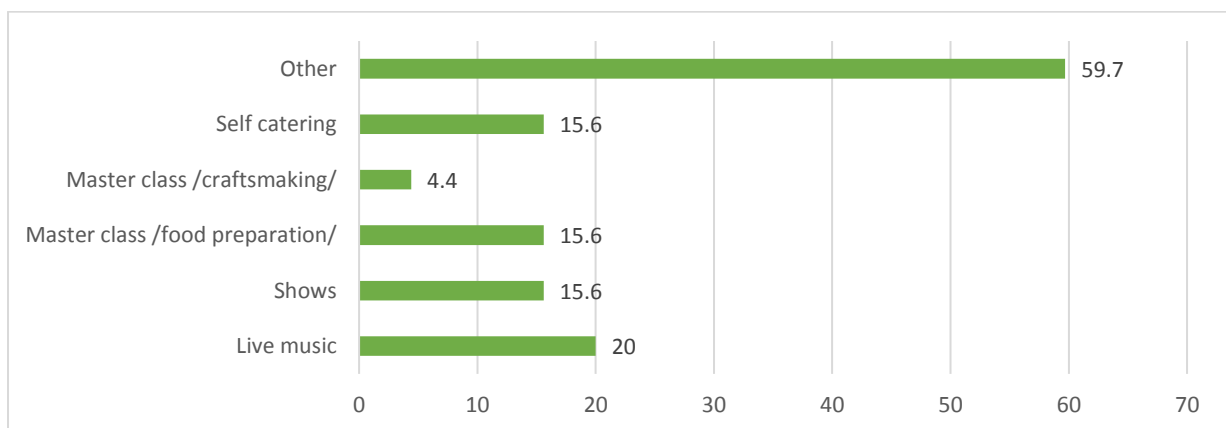
Question 15 is aimed at discovering the types of beverages preferred by Armenian travelers. Among alcoholic beverages, “wine” was chosen by the majority of surveyees (29 responses), contributing 49.2% to the total rate. “Vodka” was picked by 26 surveyees and marks up 44.1% of the overall rate. Other options include “beer” /40.7% with 24 responses/, “fruit compotes” /30.5% with 18 responses/, “mineral water” /23.7% with 14 responses/, “refreshing drinks” /22% with 13 responses/ and “tan”/15.3% with 9 responses/. Among other drinks whiskey, Syrian vodka, cognac, types of tea and coffee were mentioned. Total number of respondents is 59.

Q16 What languages does the staff communicate with?



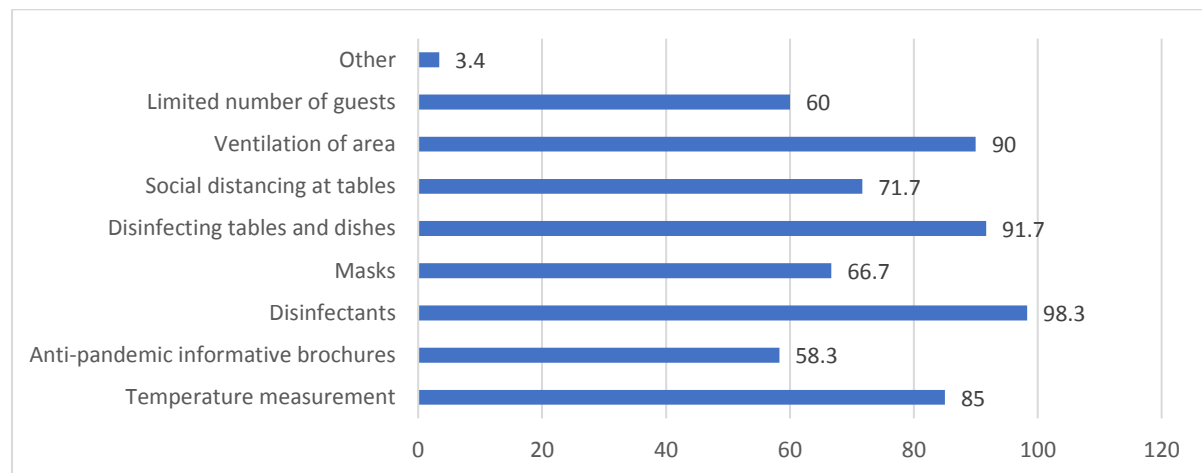
The goal of Question 16 is to identify the languages staff members of catering service providers communicate with. From foreign languages, “Russian” was chosen by 58 surveyees and makes up 98.3% of the overall rate. As for “English”, it was picked by 35 respondents and contributes 59.3% to the total response rate. Other languages include Georgian, French, Arabic and Chinese. Total number of respondents is 59.

Q17 Which of the below-mentioned services do you offer?



The aim of Question 17 is to find out what extra services are offered by catering service providers. The following were mentioned: self-catering services /15.6% with 7 responses/, master classes of craftmaking /4.4% with 2 responses/ and food preparation /15.6% with 7 responses/, shows /15.6% with 7 responses/ and live music /20% with 9 responses/. Other responses /59.7% with 26 responses/ include events, games connected with food preparation, master classes of cocktail preparation, karaoke, fishing, overnight, etc. Total number of respondents is 58.

Q18 What kind of improvements are you going to make in order to mitigate the impact of Covid-19?



The goal of Question 18 is to find out the level of awareness on Covid-19 precautionary measures. The majority of respondents /98.3%/ claim they use disinfectants /59 surveyeys/. 55 surveyeys mention disinfecting tables and dishes, marking up 91.7% of the total rate. Other responses include ventilation of area /90% with 54 responses/, temperature measurement /85% with 51 responses/, social distancing at tables /71.7% with 43 responses/, availability of masks /66.7% with 40 responses/, limited number of guests /60% with 36 responses/ and anti-pandemic informative brochures /58.3% with 35 responses/. Total number of respondents is 60.

Q19 What changes or improvements in your services do you plan to make?

Question 19 is aimed at discovering future strategic and improvement plans of catering service providers that will be implemented in the times of Covid-19 pandemic. Here is a list of the most common answers:

- create new partnerships;
- find new methods of customer safety and security provision;
- implement daily disinfections;

- raise awareness on pandemic regulations;
- add new types of teas in menus /herbal teas/;
- plan discounting strategies;
- improve sanitary norms;
- implement new promotion campaigns;
- enlarge outdoor area;
- create new anti-pandemic informative brochures;
- add new dishes and beverages rich in vitamins to their menus;
- organize new events;
- limit the number of customers;
- use automatic dishwashers and disinfecting equipments.

Total number of respondents is 46.

Conclusion

Summing up the results of the questionnaire, it can be clearly seen that regional catering service providers were hard hit by the impacts of Covid-19 pandemic and plan to establish risk mitigation strategies in order to meet the new standards. Total number of participants is 60, with the highest rates in Tavush province. The objectives of the questionnaire are met through the elaborated questions. Based on the accumulated results, the following conclusions about the regional catering service providers are drawn:

- ✓ the majority of catering service providers that took part in the survey comprise restaurants and cafés;
- ✓ among foreign languages, the majority of menus are available in English and Russian;
- ✓ ingredients of the dishes are introduced in the majority of menus of catering service providers;
- ✓ half of the menus include photos of the dishes offered at the regional catering service providers;
- ✓ regional catering service providers use both imported and regional products;
- ✓ only a small percentage of catering service providers offer regional cuisine;
- ✓ half of the catering service providers offer Armenian traditional cuisine;
- ✓ hot dishes are the most requested type of food by Armenian travelers;
- ✓ the majority of Armenian travelers are carnivores;
- ✓ wine and vodka are best-selling beverages among Armenian travelers;
- ✓ the majority of staff members of catering service providers communicate in Russian;
- ✓ precautionary norms considering Covid-19 pandemic, such as provision of disinfectants, frequent air ventilation, limited number of guests and temperature measurement, are strictly followed by all catering service providers

To overcome the impact of Covid-19, the majority of regional catering service providers plan to offer new services that will adhere to the new preventative measures.

Appendix

Հարցաթերթիկ սննդի ծառայություններ մատուցողների համար

Հարցաթերթիկը կազմվել է "Tour Advice" տուրիստական ընկերության կողմից՝ EU4Business "Innovative Tourism Action Grants in times of Covid-19" ծրագրի շրջանակներում: ԵՄ-ն բիզնեսի համար նախաձեռնության «Նորարարական տուրիզմի և տեխնոլոգիաների զարգացում Հայաստանի համար» ծրագիրը համաֆինանսավորվում է Եվրոպական միության և Գերմանիայի դաշնային հանրապետության տնտեսական համագործակցության և զարգացման նախարարության կողմից: Այն իրականացվում է Գերմանիայի միջազգային համագործակցության ընկերության (ԳՄՀՀ) «Մասնավոր հատվածի զարգացում և մասնագիտական կրթություն և ուսուցում Հարավային Կովկասում» ծրագրի կողմից:

Հարցաթերթիկի նպատակն է պարզել Շիրակի, Լոռու և Տավուշի մարզերում սննդի ծառայություններ մատուցող հաստատությունների աշխատանքային առանձնահատկությունները և ճաշացանկերի բազմազանությունը: Հավաքագրված տվյալների շնորհիվ հնարավոր կլինի բացահայտել հյուսիսային մարզերում սննդի ծառայություններ մատուցողների գործունեության շրջանակը, զբոսաշրջիկների նախընտրած սննդատեսակները և սանիտարահիգիենիկ նորմերի մասին իրազեկվածության և կիրառելիության մակարդակը: Արդյունքում կստեղծվեն զբոսաշրջային նոր երթուղիներ թիրախային մարզերի չբացահայտված զբոսաշրջային ուղղությունների շուրջ՝ ներառելով տեղական նոր ճաշացանկեր և կեցության վայրեր, որոնք իրենց հերթին կհամապատասխանեն գործող սանիտարահիգիենիկ և անվտանգության նորմերին:

1. Սննդի օբյեկտի անվանումը:

2. Գործունեության վայրը:

- Շիրակի մարզ
- Լոռու մարզ
- Տավուշի մարզ

3. Նշեք գործունեության տեսակը:

- Ռեստորան

- Հացատուն / պանդոկ
- Ճաշարան
- Արագ սննդի կետ
- Բար / փար
- Սրճարան
- Այլ

4. Առկա՞ է ճաշացանկ:

- Այո
- Ոչ

5. Ո՞ր լեզուներով է հասանելի ճաշացանկը /հնարավոր է 1-ից ավելի պատասխան/:

- Հայերեն
- Ռուսերեն
- Անգլերեն
- Այլ

6. Ճաշացանկում ներկայացվա՞ծ են բոլոր ճաշատեսակները:

- Այո
- Ոչ
- Մասամբ
- Բացակայող ճաշատեսակը կարող է պատրաստվել հյուրի ցանկությամբ

7. Ճաշացանկում ներկայացվա՞ծ են ճաշատեսակների բաղադրությունները:

- Այո /առանց ալերգենների մասին տեղեկության/
- Այո /ալերգենների մասին տեղեկությունը ներառված է/
- Ոչ
- Մասամբ

8. Ճաշացանկում տեղադրված են նկարներ:

- Այո
- Ոչ
- Ոչ բոլոր ճաշատեսակների համար

9. Ի՞նչ տեսակի մթերքներ եք օգտագործում:

- Տվյալ մարզի արտադրանքներ
- Դրսից ներկրվող արտադրանքներ
- Երկուսն էլ
- Այլ

10. Ձեր ճաշացանկի քանի՞ տոկոսն են կազմում տվյալ տեղանքին բնորոշ ճաշատեսակները:

- 0-25
- 25-50
- 50-75
- 75-ից բարձր

11. Ո՞ր երկրների խոհանոցի ճաշատեսակներն եք մատուցում:

- Հայկական
- Եվրոպական
- Արևելյան
- Այլ

12. Հայ զբոսաշրջիկները ո՞ր ճաշատեսակներից են ամենաշատն օգտվում /առավելագույնը 2 պատասխան/:

- Տվյալ տարածաշրջանին բնորոշ ավանդական ճաշատեսակներ
- Հայկական ավանդական խոհանոց
- Համաշխարհային խոհանոցի ճաշատեսակներ
- Արագ սնունդ
- Այլ

13. Ի՞նչ սնունդ են ամենաշատը պատվիրում հայ զբոսաշրջիկները /առավելագույնը 2 պատասխան/:

- Նախուտեստ
- Տաք ուտեստ
- Դեսերտ
- Ձկնամթերք
- Այլ

14. Ինչպիսի՞ ծագման սնունդ են նախընտրում հայ զբոսաշրջիկները:

- Մսային
- Բուսական
- Այլ

15. Ի՞նչ տեսակի ակոհոլային և ոչ ակոհոլային խմիչքներ են նախընտրում հայ զբոսաշրջիկները /առավելագույնը 2 պատասխան/:

- Թան
- Մրգային կոմպոտ
- Հանքային ջուր
- Գազավորված քաղցրահամ ըմպելիքներ
- Գարեջուր
- Գինի

- Օղի
- Այլ

16. Սպասարկող աշխատակազմը ի՞նչ լեզուների է տիրապետում /հնարավոր է 1-ից ավելի պատասխան/:

- Հայերեն
- Անգլերեն
- Ռուսերեն
- Այլ

17. Հետևյալ ծառայություններից որո՞նք եք առաջարկում /հնարավոր է 1-ից ավելի պատասխան/:

- Կենդանի երաժշտություն
- Շոու ծրագրեր
- Վարպետաց դասեր /սննդի պատրաստման/
- Վարպետաց դասեր /արհեստագործական/
- Ինքնասպասարկում /ճաշատեսակների ինքնուրույն պատրաստում և սպասարկում/
- Այլ

18. Covid-19 համավարակի տարածման կանխարգելմանն ուղղված ի՞նչ միջոցառումներ եք իրականացնում /հնարավոր է 1-ից ավել պատասխան/:

- Ջերմաչափում և մատյանի մեջ գրանցում
- Տարածքում տեղեկատվական բրոշյուրների տեղադրում
- Ախտահանման միջոցների առկայություն
- Միանգամյա օգտագործման բժշկական դիմակների առկայություն
- Սեղանների և սպասքի ախտահում

- Սեղանների տեղադրում 1.5 մետր հեռավորության վրա
- Տարածքի մշտական օդափոխում
- Այցելուների սահմանափակ քանակ
- Այլ

19. Խնդրում ենք նշել ի՞նչ բարելավումներ կամ փոփոխություններ եք նախատեսում իրականացնել:



ԵՎՐՈՊԱԿԱՆ ՄԻՈՒԹՅՈՒՆԸ ՀԱՅԱՍՏԱՆԻ ՀԱՄԱՐ
EUROPEAN UNION FOR ARMENIA



Implemented by
giz
GIZ - German Development Cooperation
GIZ-Հայաստանի Հանրապետության համագործակցություն

This publication has been produced with the financial assistance of the European Union. The contents of this publication are the sole responsibility of Tour Advice LLC and can under no circumstances be regarded as reflecting the position of the European Union.