



Introduction

This report presents the basic trends in domestic travel by Georgian residents for the period of second quarter of 2014. Figures include the results of a household survey conducted by the National Statistic Office of Georgia.

Domestic travel concerns residents of Georgia travelling within the country for a given period and involves people spending money on activities and accommodation outside of their normal routine and contributing to local economies (Box 1).

The main areas of interest in this report include trips for leisure, business, visiting friends and relatives (VFR) purposes, expenditure during the trip, and other variables.

Significance of domestic travel

Domestic tourism generates significant economic activity and employment in the world, including in Georgia.

Domestic travel spending generated 71.3% of direct Travel & Tourism GDP in 2013 compared with 28.7% for visitor exports (i.e. foreign visitor spending or international tourism receipts)¹.

How many domestic trips do Georgians take?

Georgians took a total of 3.4 million domestic trips in the second quarter of 2014.

There was a difference in the number of domestic visits carried out by region. Residents of Imereti and Tbilisi regions travelled the most, undertaking 23.1% and 22.6% of domestic visits respectively (Figure 1).

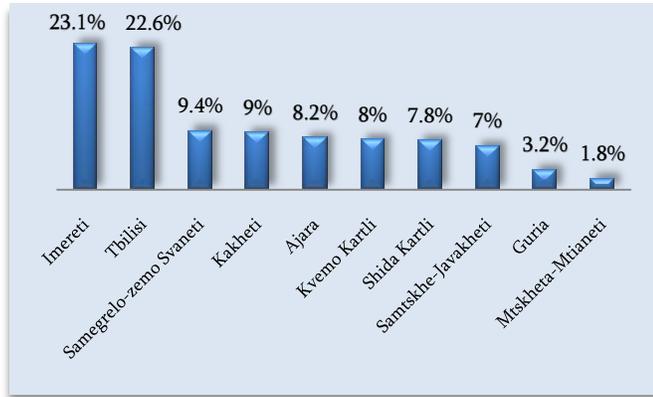


Box 1: Methodology To Measure Domestic Visits

In the context of tourism statistics, two simultaneous methods are used for the classification of a domestic visit: location and regularity. The location method takes into consideration the municipal structure of the country. To define the usual environment, it is crucial whether the domestic traveler made a visit outside of his/her municipality. The second method defines the specific frequency of visits that are considered regular. If a Georgian domestic traveler visits another municipality less than once every two weeks, this is not considered regular and is therefore classified as a domestic visit.

¹See World Travel & Tourism Council (2014): "The Economic Impact of Travel & Tourism 2014".

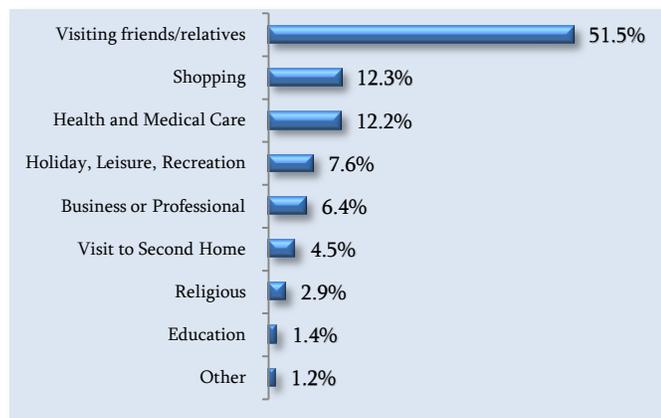
Figure 1: Domestic visits by region



What are the main purposes of domestic trips?

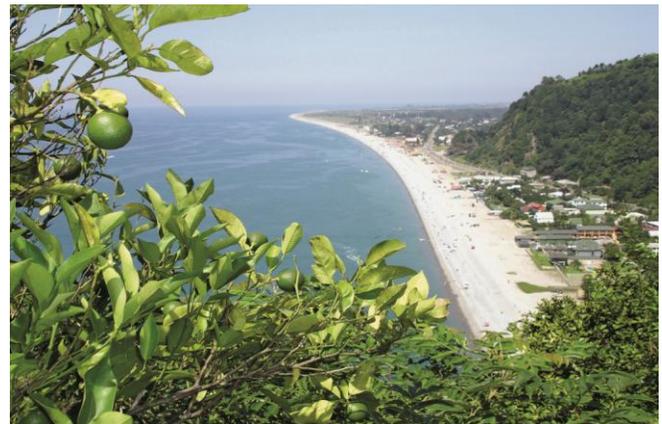
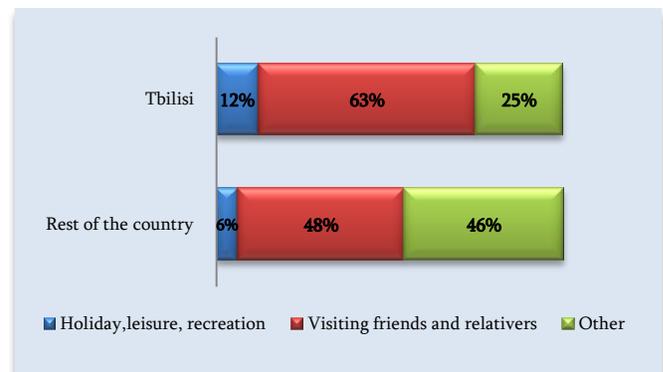
The majority of domestic visits were carried out for VFR (51.5%), followed by 12.3% of trips for shopping, 12.2% for health and medical care, while 7.6% of trips were carried out for holiday, leisure and recreation purposes (Figure 2).

Figure 2: Purpose of visit



There are slight differences in the distribution of purpose of visit between the residents of Tbilisi and the rest of the country. 12% of visits from Tbilisi were carried out for holiday, leisure or recreation purposes, while 6% of visits were for the same purpose from the rest of the country. 63% of Tbilisi residents traveled to visit friends and relatives, while the same indicator for the rest of the country was 48% (Figure 3).

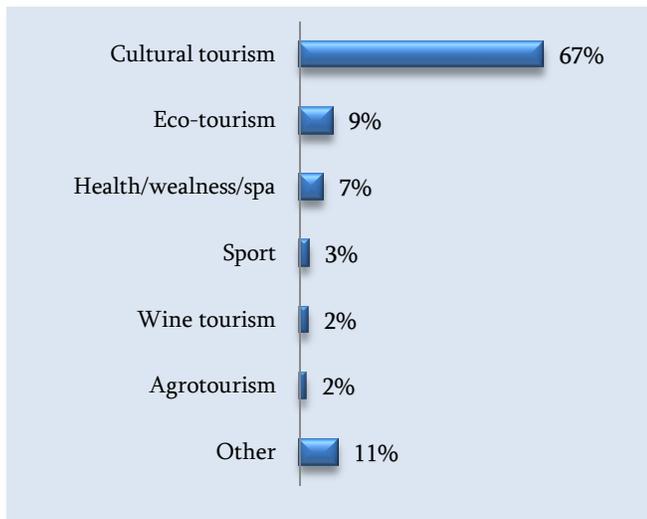
Figure 3: Purpose of visit by place of residence



What are the popular types of tourism?

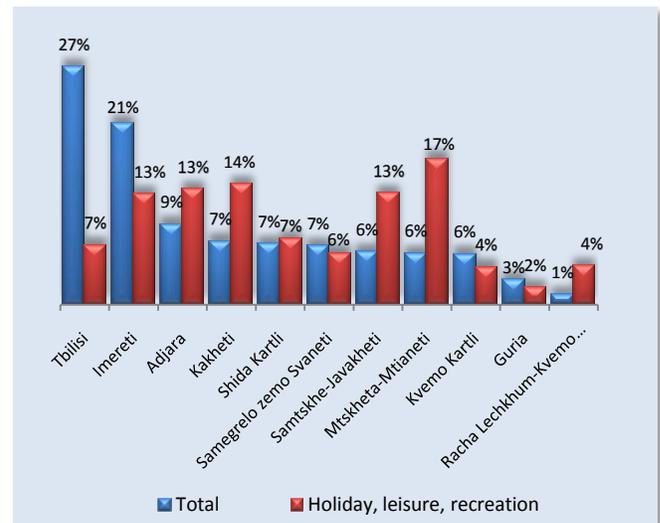
Domestic visitors participated in different types of tourism while travelling in Georgia. From holiday trips most popular were cultural tourism (67%), followed by 9% eco-tourism and 7% health/wellness and spa tourism (Figure 4).

Figure 4: Types of tourism



The most popular regions to visit for holiday, leisure and recreation purposes were the following: Mtskheta-Mtianeti (17%), Kakheti (14%), Imereti (13%), and Adjara (13%) (Figure 5).

Figure 5: Most visited Regions



Most domestic trips were made to Tbilisi (27%), followed by Kutaisi 9% and Batumi 6%. (Figure 6).

What regions do domestic travelers visit?

In the second quarter of 2014, 21% of domestic trips were taken to the Imereti region, followed by 9 % of trips to Adjara, and 7% to Kakheti.



Figure 6: Most visited destinations

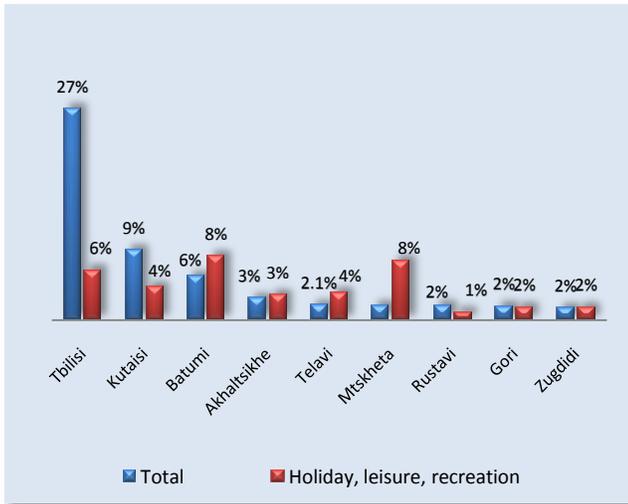


Table 1: Duration of Stay

Place of residence	Average length of the trip
Samegrelo-zemo Svaneti	2.1
Ajara	2.0
Tbilisi	2.0
Guria	1.5
Samtskhe-Javakheti	1.3
Imereti	1.2
Kakheti	1.2
Mtskheta-Mtianeti	1.2
Shida Kartli	0.9
Kvemo Kartli	0.9

How long do they travel?

In the second quarter of 2014, the total number of overnight stays was 5.2 mil, while the average trip length was 1.5 nights. 44% of domestic trips included at least one overnight stay. Visitors from Samegrelo-zemo Svaneti, Ajara and Tbilisi tended to stay for longer periods (2 nights on average), while other visitors spend 1 night on average (Table 1).

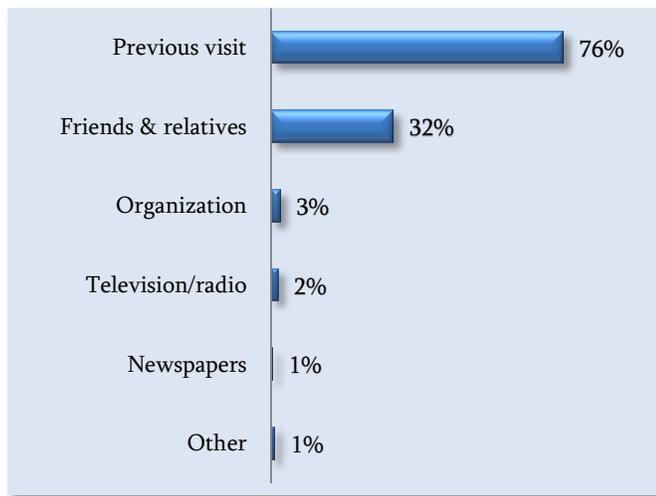
Average length of holiday trips was 1.9 nights. Among the trips the highest length of stay was registered for visiting second home (2.7 nights on average), while average length for business trips was 1 night.



What kind of sources do domestic travelers use to find information?

Prior to undertaking a trip, domestic visitors used various sources to gather information about Georgia. 76% of visitors obtained information from their previous visit, while 32% - from their friends or relatives (Figure 7).

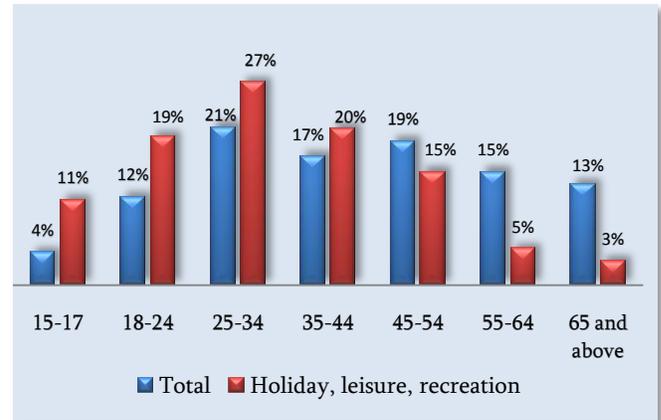
Figure 7: Information sources



What is the age and sex profile of domestic travelers?

The majority of Georgians taking a domestic trip were female (55%), while 45% were male. 21% of Georgians taking a domestic trip were 25–34 years old and 19 % were ages 45-54. This was followed by 17% ages 35 to 44, and 15 % ages 55-64 (Figure 8).

Figure 8: By age group



What accommodation types do they use?

Domestic visitors preferred to stay at friend’s or relative’s homes (73% of total overnight stays). “Own house” took second place with 14% of total overnight stays and a „rented apartment” took third place (4%). For holiday visits specifically, 42% of total overnight stays included stays at friend’s and relative’s houses, 32% rented apartments, while 9% used hotels (Figure 9).



Figure 9: Accommodation (overnight stays)

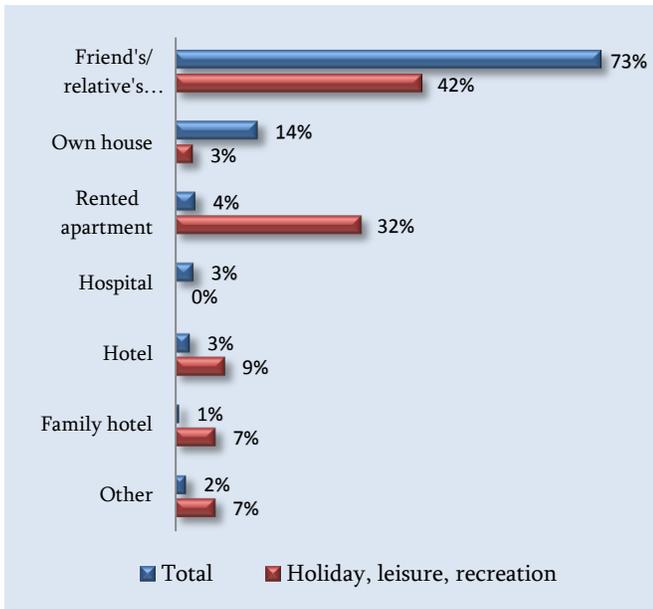


Table 2: Expenditures

Expenditure components	Total Expenditure GEL (x1000)	Share of Total Expenditure
Shopping	125,075	28%
Food and Drinks	121,390	27%
Transportation	80,581	18%
Accommodation	14,394	3%
Cultural and Entertainment Service	5,339	1%
Other	103,021	23%

How much do domestic travelers spend?

Total expenditures made by domestic visitors during the estimated period was more than 449.8 million GEL and the average expenditure per visit was around GEL 131.

Most expenditures were spend on shopping (over 125 million GEL, 28% of total expenses), followed by food and drinks (more than 121 million GEL, 27%), transportation (more than 80 million GEL, 18%), and accommodation (over 14 million GEL, 3%) (Table 2).

How satisfied are domestic visitors?

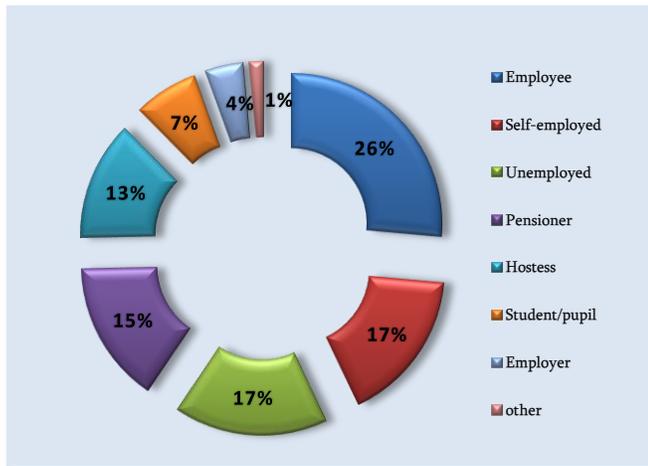
54% of domestic visitors were satisfied with their trips, 30%-highly satisfied, while 2% do not answer the question. On a 5 point scale, average satisfaction of domestic visitors was estimated at the rate of 4.15.



Who are the domestic travelers?

The majority of domestic trips were carried out by people currently employed (26%), followed by those self-employed (17%), and unemployed persons (17%) (Figure 10).

Figure 10: Economic activity of domestic visitors



This report was prepared by the Research and Planning Department of Georgian National Tourism Administration.

Tel: +995 322 43 69 99 (30)

E-mail: infostatistics@gnta.ge